Credit Union | CU Learn

USER GUIDE

For CU Learn Coordinators and Users

www.culearn.ie

CU Learning & Development

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Purpose of Manual

The purpose of this document is to:

- Explain the background of CU Learn – the new training admin system for credit unions.
- Outline the system structure at a high level.
- Provide guidance on using the system and to be able to assist users and Coordinators in
    - registering on the system
    - enrolling in a course
    - taking eLearning courses
    - Booking an In-house or Chapter event
    - Managing CPD
- Assist in the carrying out of CU Learn Coordinator duties, i.e., approving registrations, viewing training taken in the credit union and running reports.

CU Learn Background

Background

CU Learn was developed by the ILCU to facilitate the efficient administration of training and education for the credit union movement and is **free** for all ILCU affiliated credit union staff and volunteers. Each credit union will be asked to provide CU Learning & Development (CU L&D) with the details of a *CU Learn Coordinator* to act as the system administrator for their credit union and their role will be to:

- Approve user registrations
- Assist users on the system
- Oversee use of CU Learn
- Run reports and maintain CU Learn

CU Learn can be used to plan, book and manage open schedule training programmes, in-house & cluster training programmes, the Advanced Certificate in Credit Union Practice (ACCUP), Pathways, CU CPD, and other training programmes and ILCU events, including chapter or ad-hoc training, as required.

Benefits of CU Learn to users

The benefits of CU Learn to training participants include:

- A centralised learning environment
- Personalised training reports
- Allows online enrolment to courses/seminars/training programmes – 24/7
- CU CPD scheme members area, allowing members to track CPD requirements in real time, take free e-learning and access additional CPD information
- Communication tool and news feature
- Access to online classrooms for ACCUP and Pathways students.

Benefits of CU Learn to the credit union

The benefits of CU Learn to the credit union and training coordinator include:

- Allows maximum control over training that occurs within the credit union
- Tracks training schedules and attendance for each officer
- Management of training requests
- Customised reports, e.g. credit union spend on training, upcoming bookings, CPD records
- Access to training documentation for regulatory and legal purposes; i.e. MCR register generator
- Improves compliance with regulatory training obligations through record keeping of regulatory training requirements
- Organisation of training at individual, credit union and chapter level.

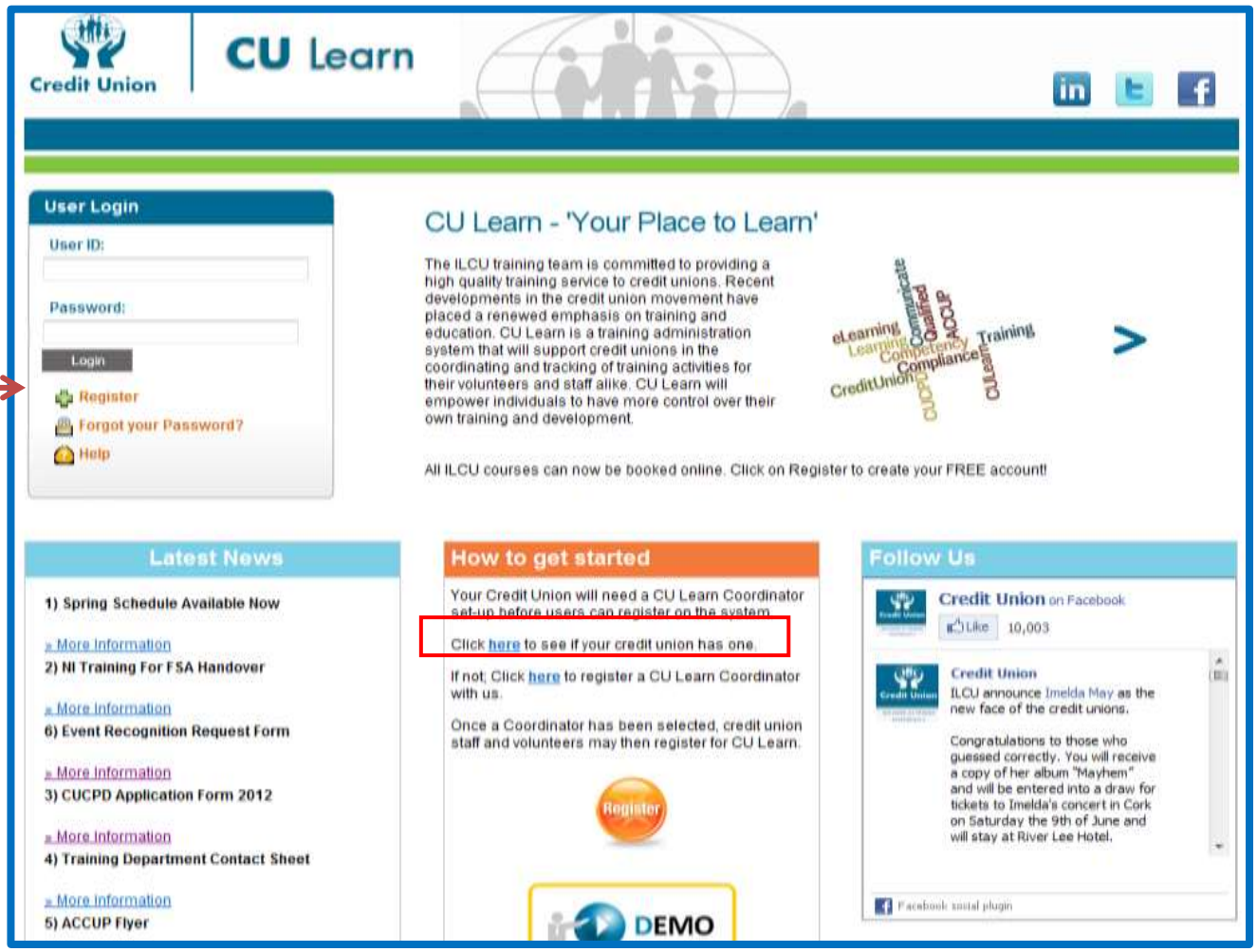
The next section of this user manual outlines step by step the key tasks on the CU Learn system.

User Accounts

Register as a Learner (User)

In order for Users to Register onto CU Learn each credit union must have a ***CU Learn Coordinator*** in place.

Example Login Screen of CU Learn


Credit Union
CU Learn
User Login
User ID:
Password:
Login
Register
Forgot your Password?
Help
CU Learn - 'Your Place to Learn'
The ILCU training team is committed to providing a high quality training service to credit unions. Recent developments in the credit union movement have placed a renewed emphasis on training and education. CU Learn is a training administration system that will support credit unions in the coordinating and tracking of training activities for their volunteers and staff alike. CU Learn will empower individuals to have more control over their own training and development.
All ILCU courses can now be booked online. Click on Register to create your FREE account!
Latest News
1) Spring Schedule Available Now
» More Information
2) NI Training For FSA Handover
» More Information
6) Event Recognition Request Form
» More Information
3) CUCPD Application Form 2012
» More Information
4) Training Department Contact Sheet
» More Information
5) ACCUP Flyer
How to get started
Your Credit Union will need a CU Learn Coordinator set-up before users can register on the system.
Click here to see if your credit union has one.
If not, Click here to register a CU Learn Coordinator with us.
Once a Coordinator has been selected, credit union staff and volunteers may then register for CU Learn.
Register
DEMO
Follow Us
Credit Union on Facebook
Like 10,003
Credit Union
ILCU announce Imelda May as the new face of the credit unions.
Congratulations to those who guessed correctly. You will receive a copy of her album "Mayhem" and will be entered into a draw for tickets to Imelda's concert in Cork on Saturday the 9th of June and will stay at River Lee Hotel.

Once the credit union has been set up with a Coordinator, user registration on CU Learn is then easy and simply requires the user clicking **"Register"** on the above CU Learn Login Screen, accepting the CU Learn terms and conditions and entering their details. **All users must first Register on CU Learn before they can use the system.** Users will receive an email confirming their registration once approved by the CU Learn Coordinator.

Approve Registration Request (Coordinator)

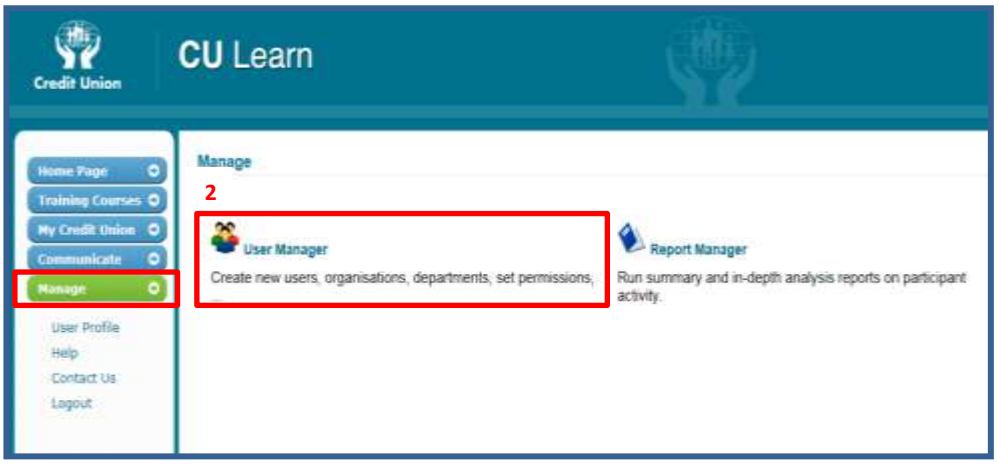
Once a CU Learn Coordinator logs into the system the **Homepage** below is displayed. This is similar to the **Homepage** a user would see but with the addition of two important additional items; the ***My Credit Union*** option and the ***Manage*** option. These options allow the Coordinator to manage and coordinate training for all the credit union, to edit records and run reports. We will look at these options again later in this manual.

Example CU Coordinator Homepage of CU Learn

One of the central roles of the CU Learn Coordinator is to manage who has access to the system. Whenever a user registers for CU Learn the CU Learn Coordinator will receive an email asking them to approve the registration. They must then go into CU Learn and change that user's status from ***Pending*** to ***Active*** before the user can access CU Learn.

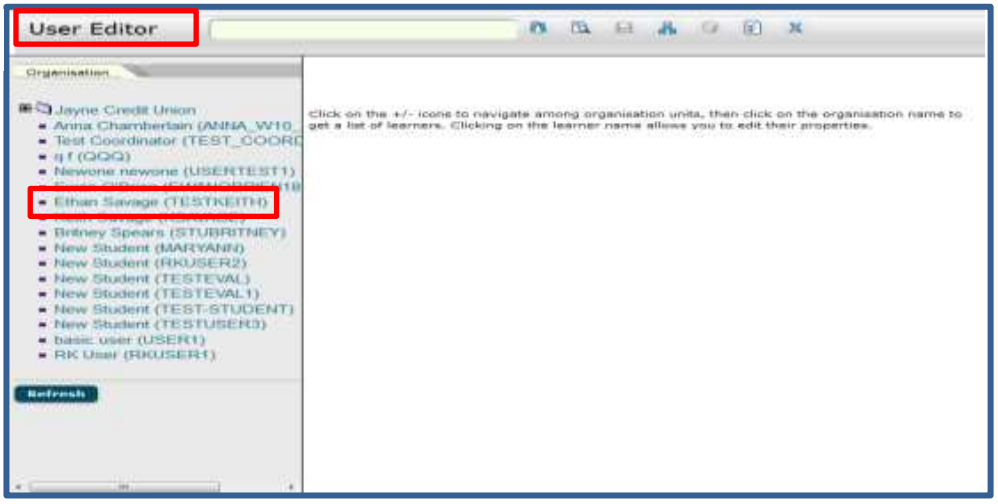
If there is an issue with the registration (i.e. you don't' know who they are!) then do not approve the registration and inform CU L&D. **You must ensure that any user you approve is either a current volunteer or staff member of your credit union.**

To approve a user registration do the following:



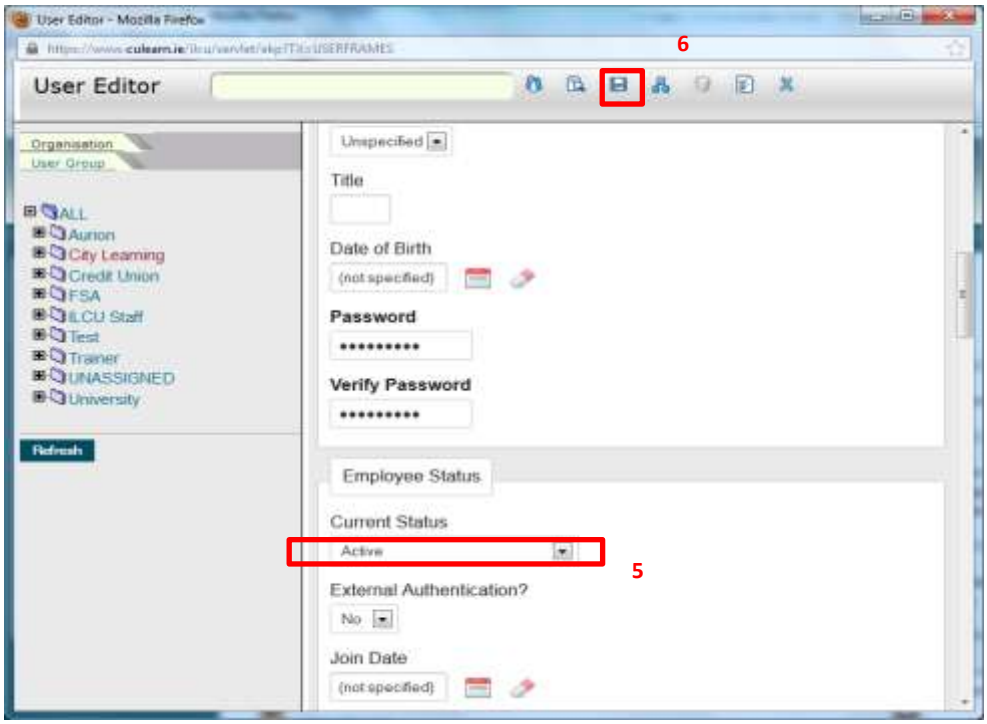
1.
Click ***Manage*** on the Home Screen

2.
Click ***User Manager*** and then ***User Editor***


3
User Editor
Organisation
Jayne Credit Union
Anna Chamberlain (ANNA_W10
Test Coordinator (TEST_COORD
q f (QQQ)
Newone newone (USERTEST1)
Ethan Savage (TESTKEITH)
Britney Spears (STUBRITNEY)
New Student (MARYANN)
New Student (RKUSER2)
New Student (TESTEVAL)
New Student (TESTEVAL1)
New Student (TEST-STUDENT)
New Student (TESTUSER3)
basic user (USER1)
RK User (RKUSER1)
Refresh
Click on the +/- icons to navigate among organisation units, then click on the organisation name to get a list of learners. Clicking on the learner name allows you to edit their properties.
4

3.
This will pop up the User Editor screen. On the left hand side of this screen you will see a list of Users.

4.
Click the User Name you wish to edit.



5.
You will see the **User Details** screen. Change the *Current Status* drop down from ***User pending approval*** to ***Active.***

6.
Click the ***Save*** icon at the top of the screen.

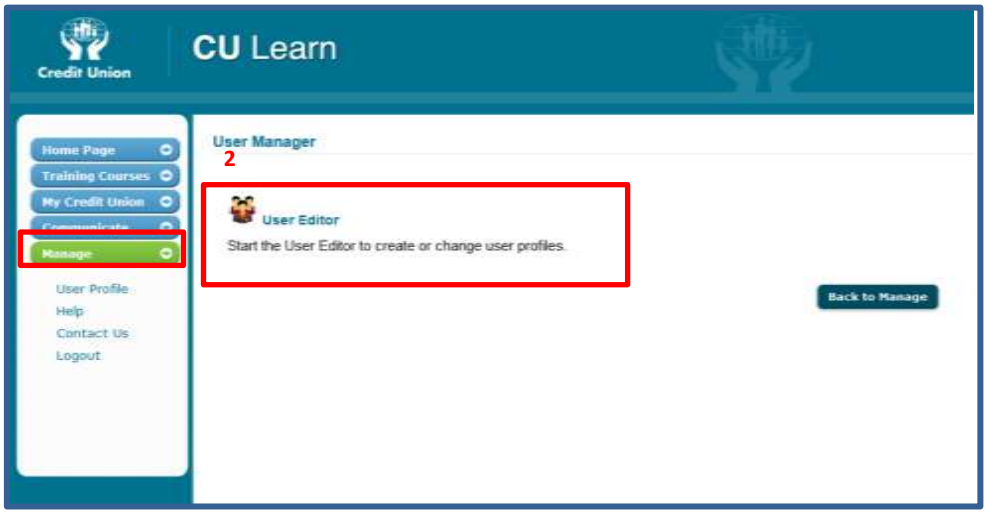
NB

Remember always to click on ***SAVE*** or your actions will be lost!

Create a New User Account (Coordinator)

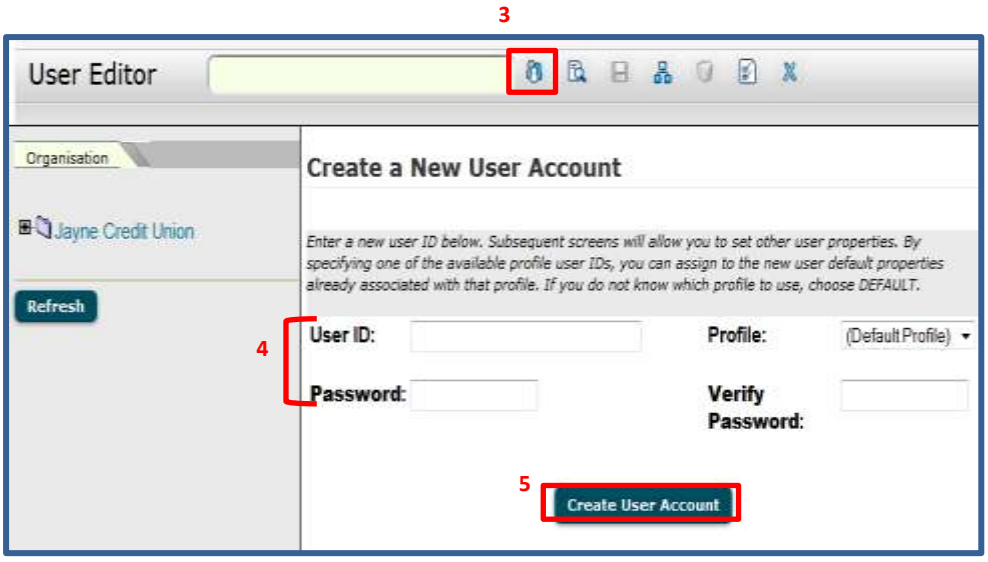
Users can create their own account at any time by self-registering (See 3.1 above). If, for any reason, they are unable to do this, the coordinator follow the process outlined below to set up their account for them.

From the CU Learn Homepage:



1.
Click **Manage.**

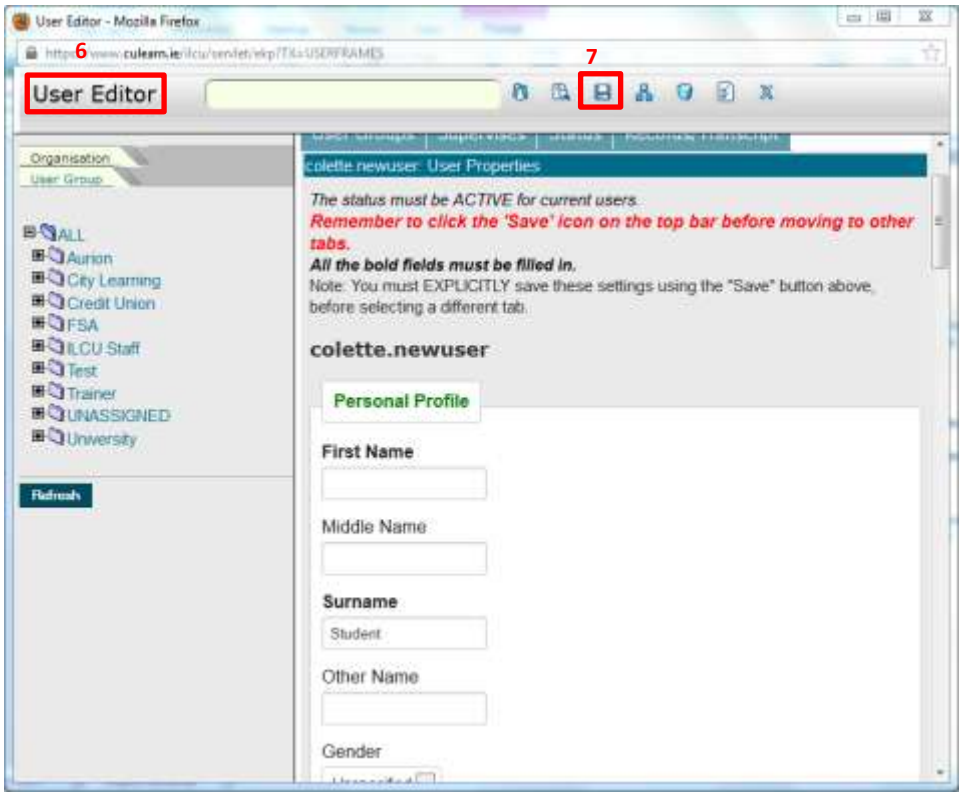
2.
Click ***User Manager*** and then ***User Editor***.


3
User Editor
Organisation
Jayne Credit Union
Refresh
Create a New User Account
Enter a new user ID below. Subsequent screens will allow you to set other user properties. By specifying one of the available profile user IDs, you can assign to the new user default properties already associated with that profile. If you do not know which profile to use, choose DEFAULT.
4
User ID:
Password:
Profile:
(Default Profile)
Verify Password:
5
Create User Account

3.
Click the ***Create User*** icon at top of screen. The screen will update.

4.
You will see the **Create a New User Account** information screen, simply enter a User ID, enter and verify a password into the fields provided. (Use the word "password" as your password), leave the profile as (Default Profile).

5.
Click ***Create User Account.***



6.
The screen will update to the **User Editor** screen. Update the following fields:
**** First Name & Surname***
**** Password***
**** CU Learn Coordinator Name (Yours)***
**** CU Learn Coordinator e-Mail (Yours)***
**** User e-Mail Address***

7.
Finish the process by clicking the ***Save*** icon at the top of the screen.

NB

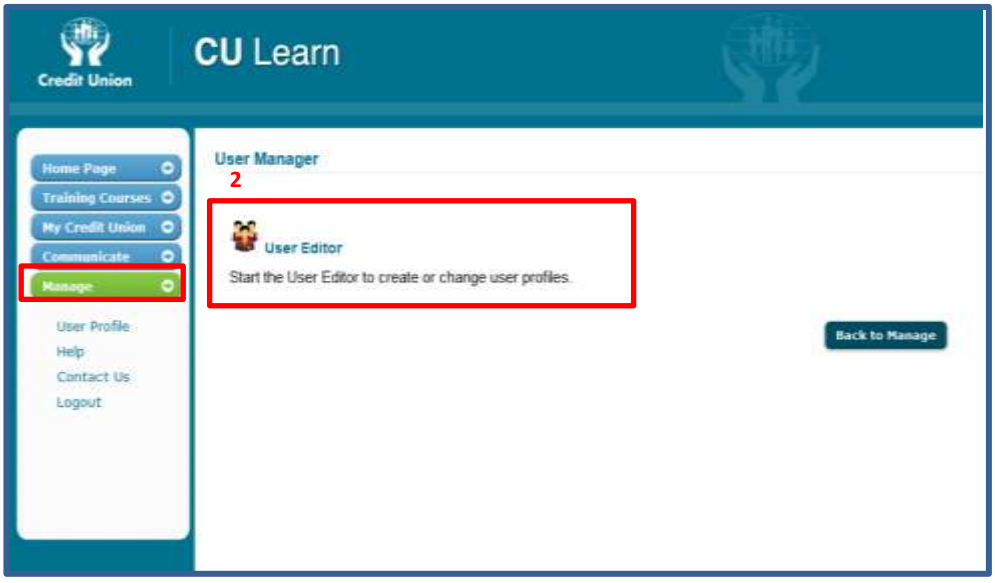
You **must** enter coordinator details on a user account. Coordinators are regularly copied on participant emails. You will not receive these emails if the *CU Learn Coordinator e-mail* field is blank.

Update existing User Account (e.g. Reset a User Password)

The CU Learn Coordinator can edit and update user information by following the steps outlined below. Quite commonly a user may forget their password. Note: the system has a "forgot password" facility that requires the user to enter their username (usually in the format firstname.lastname) and will email them a link to reset their password.

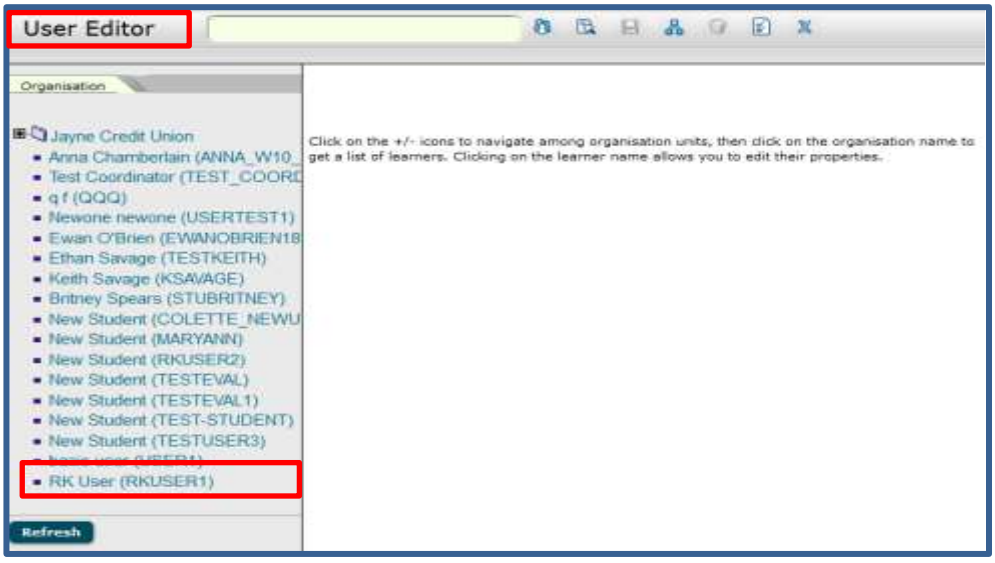
If a user cannot do this (i.e. they may not have access to their email) the CU Learn Coordinator can reset the password or otherwise edit user details as follows.

From the CU Learn Homepage:



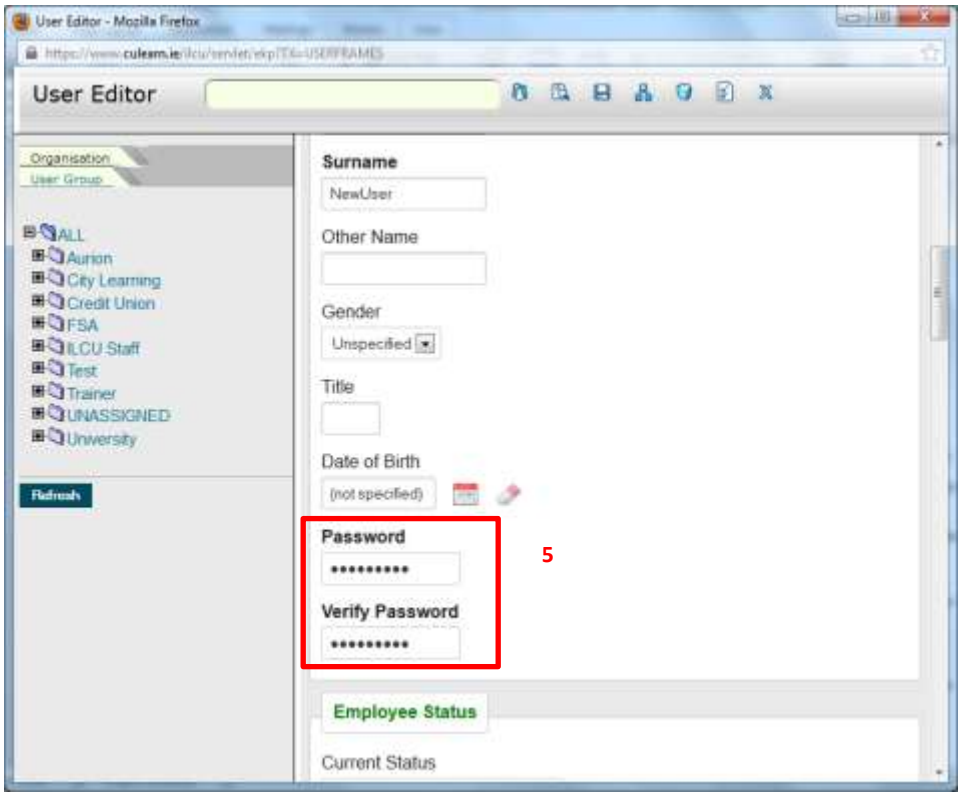
1.
Click **Manage**.

2.
Click ***User Manager*** and then ***User Editor***.

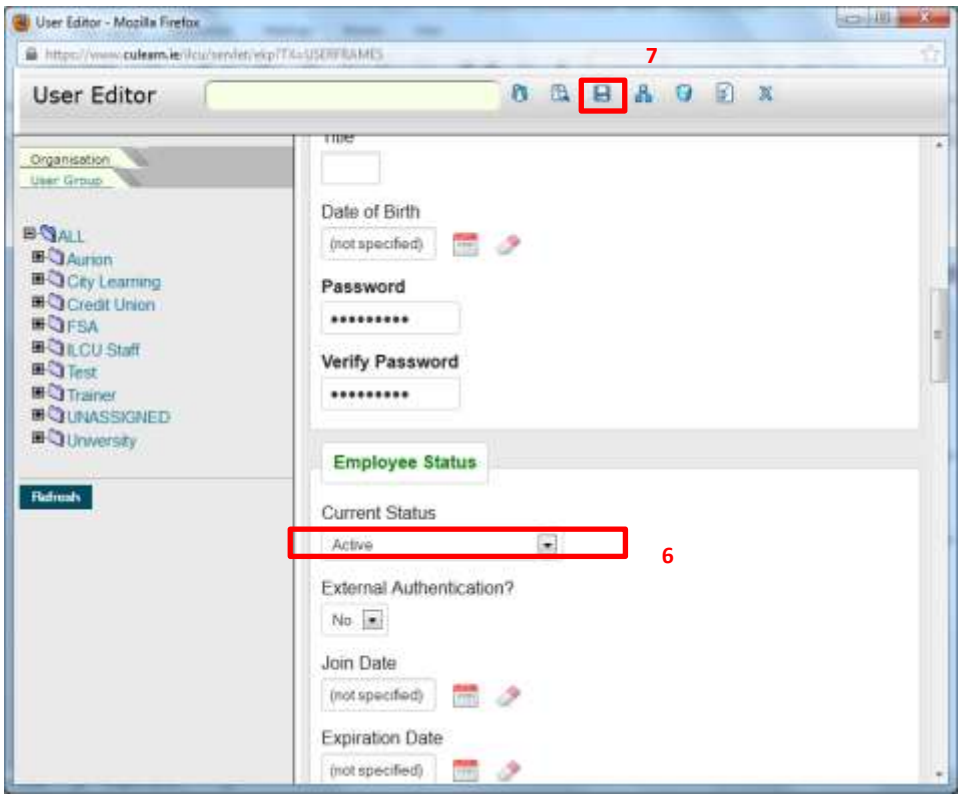


3.
This will pop up the **User Editor** screen. On the left hand side of this screen you will see a list of Users.

4.
Click the User Name you wish to edit.



5.
To change the password, type a temporary password (i.e. "password") and then repeat it to verify. The User will be asked to change this when they login again.



6.
Check the ***Current Status*** – this should be set to Active.

7.
Click the ***Save*** icon at the top of the screen

Note: Do **not** change the *External Authentication* field. This should always be set to "No".

NB **Housekeeping:** Users who are no longer with your credit union should have their status set to ***Account Closed***. Regularly review the accounts under your credit union and set those no longer in use, to ***Account Closed***. If you close an account for a CPD member, they are not automatically removed from the scheme. To remove someone from the scheme, you must contact CU L&D.

Deactivate an Account (Coordinator)

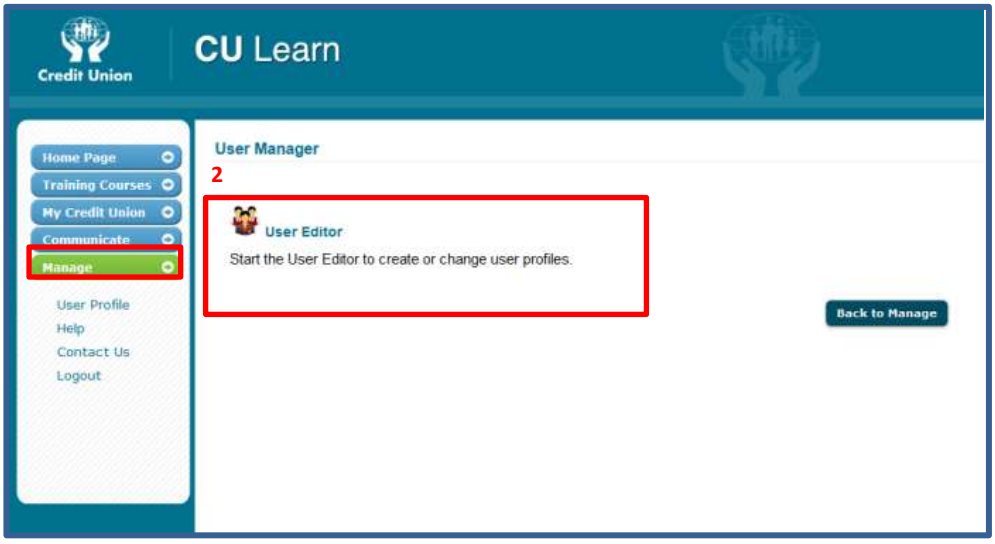
It is important that those users who no longer use CU Learn are deactivated on a regular basis.

It is the CU Learn Coordinators responsibility to do this – this reduces the overall activity (and therefore cost) on the system and helps ILCU to maintain this service free to all credit unions.

To deactivate an account follow the steps outlined below.

From the CU Learn Homepage:

1

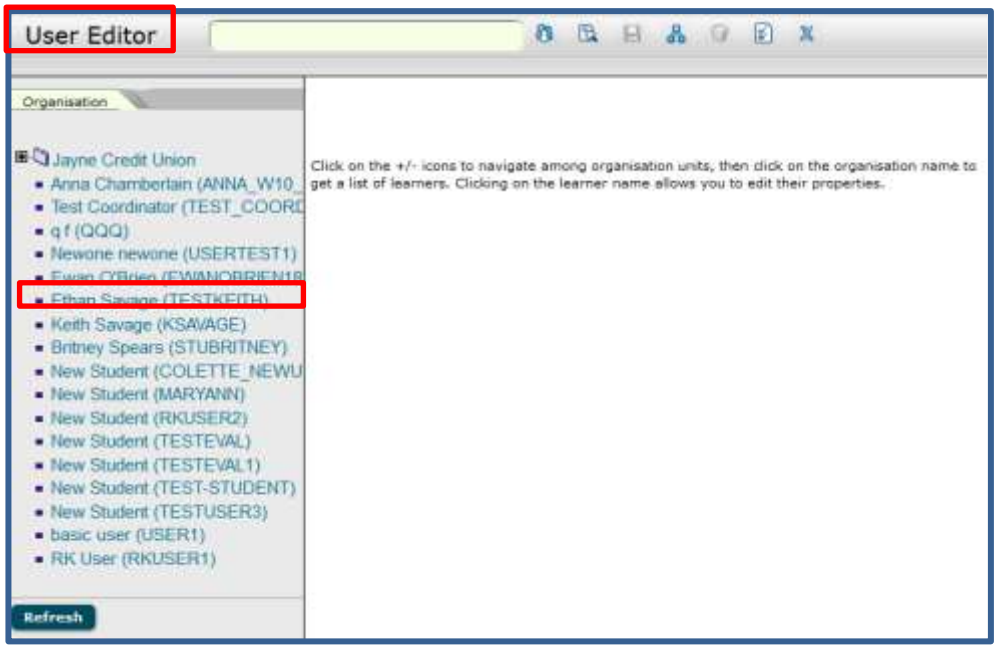


1.
Click **Manage**.

2.
Click ***User Manager*** and then ***User Editor***.

3

4


User Editor
Organisation
Jayne Credit Union
Anna Chamberlain (ANNA_W10_
Test Coordinator (TEST_COORD
q f (QQQ)
Newone newone (USERTEST1)
Ethan Savage (TESTKEITH)
Keith Savage (KSAVAGE)
Britney Spears (STUBRITNEY)
New Student (COLETTE_NEWU
New Student (MARYANN)
New Student (RKUSER2)
New Student (TESTEVAL)
New Student (TESTEVAL1)
New Student (TEST-STUDENT)
New Student (TESTUSER3)
basic user (USER1)
RK User (RKUSER1)
Refresh
Click on the +/- icons to navigate among organisation units, then click on the organisation name to get a list of learners. Clicking on the learner name allows you to edit their properties.

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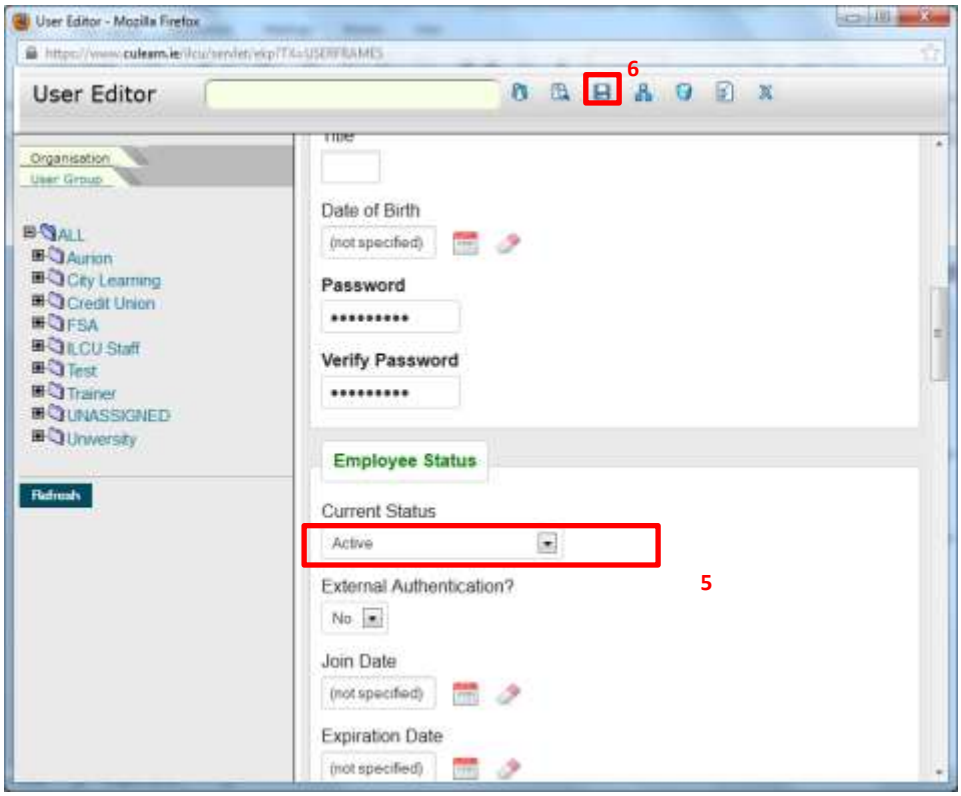
4.
Click the User Name you wish to edit.



5.
You will see the **User Details** screen. To deactivate an account, simply change the ***Current Status*** drop down from ***Active*** to ***Account Closed***.

6.
Click the ***Save*** icon at the top of the screen.

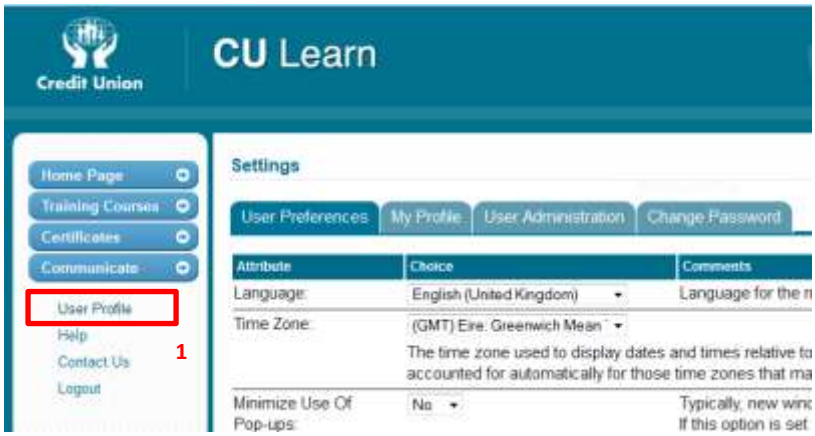
NB

Always deactivate Users who are not on the system. ILCU retains the right to deactivate inactive Users at any time as per the terms and conditions of use for CU Learn.

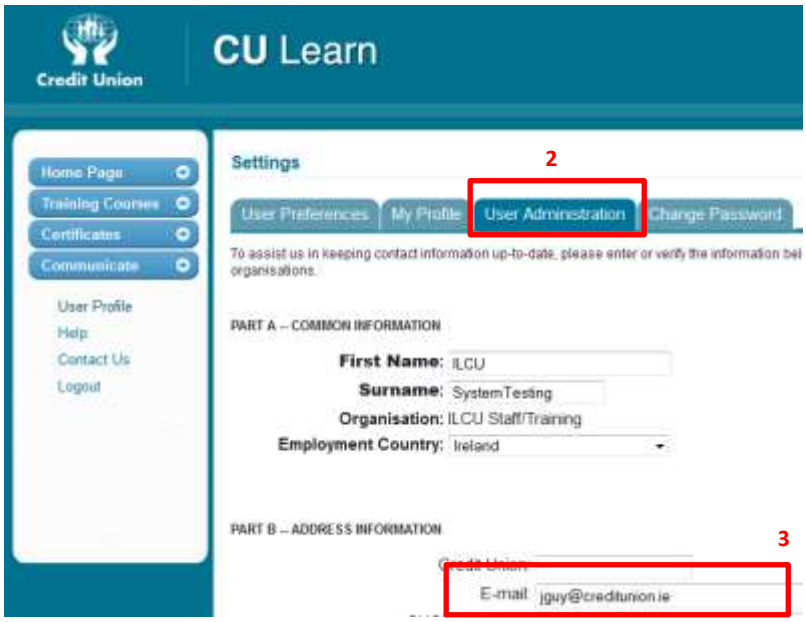
Update My Details (User and Coordinator)

You can update your details on the system if required, for example, you may want to update your email address if it has changed.

From the CU Learn home page:



1.
Click **User Profile**. From here, you can update your user preferences, personal details, and also change your password.



2.
To update your email address, and other personal details, click **User Administration**.

3.
Update the *E-mail* field.

Booking Courses

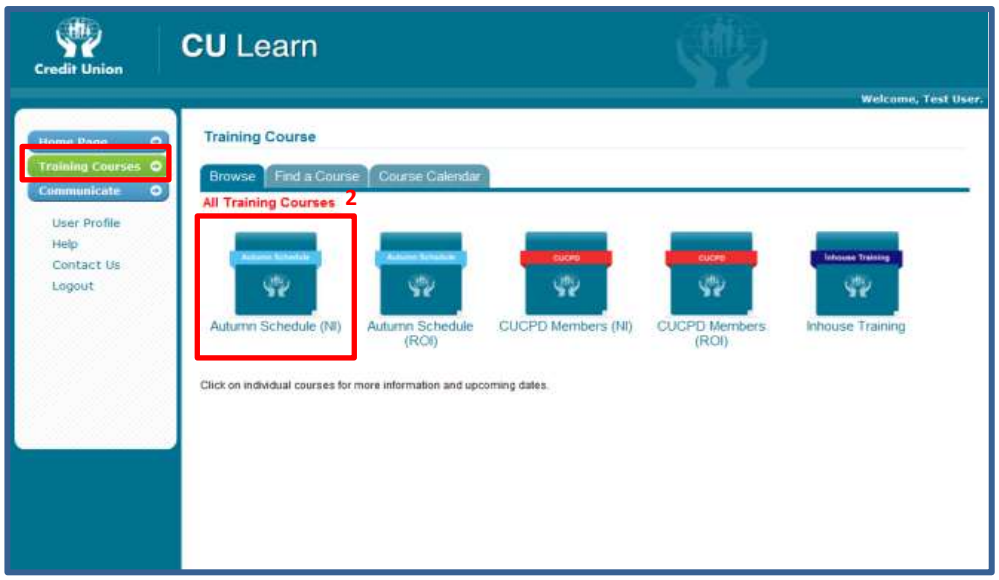
Find and Book a Course (User)

There are two options to locate and book training courses which can all be found under the **Training Courses** menu option:

- **Browse** the training catalogue
- Search for all courses under the **Find a Course** tab

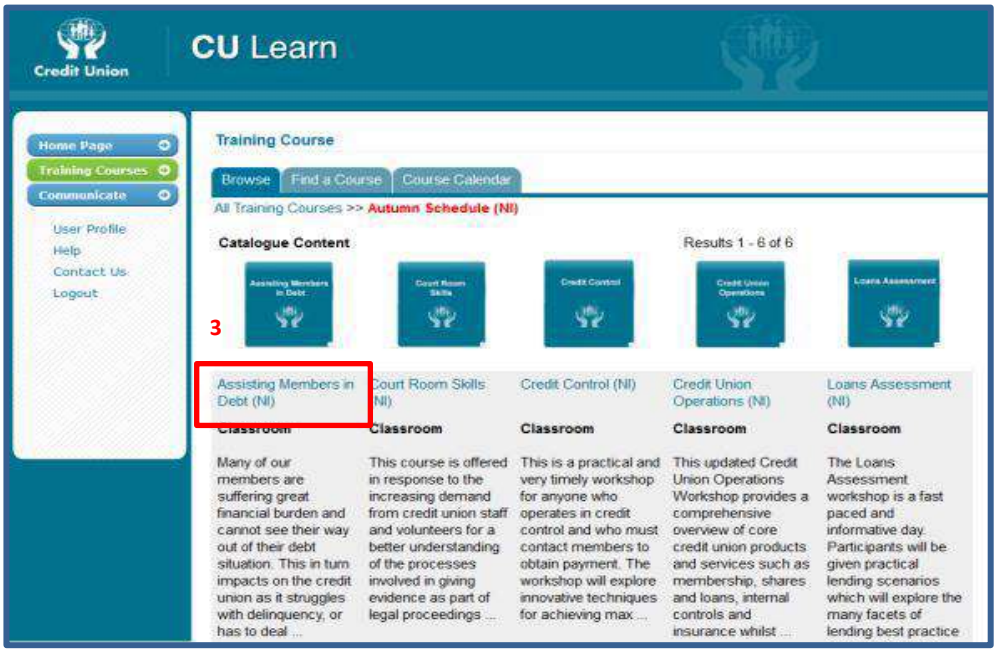
The browse training catalogue option is shown in steps 1-2 below. Once a course is located, steps 3-6 below then show how to then book onto that course

From the CU Learn Homepage:

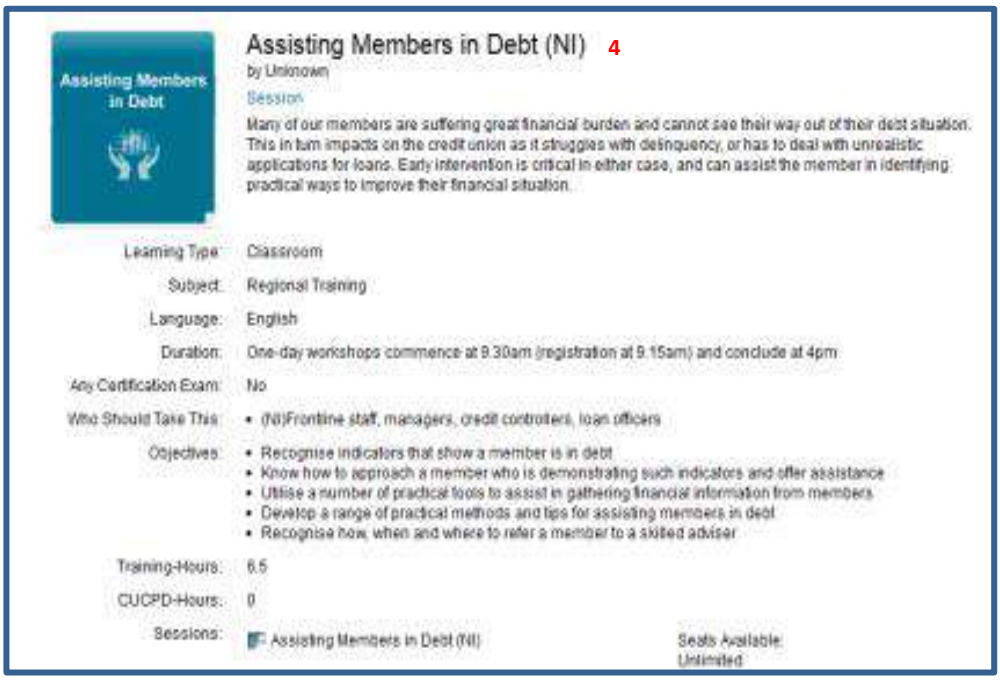


1.
Click **Training Courses**.

2.
Click on a ***Course Catalogue*** for more information for those courses.
User's individual access rights determine which Course Catalogues are displayed for each user. For example, only CU CPD members will have access to the CU CPD Course Catalogue.

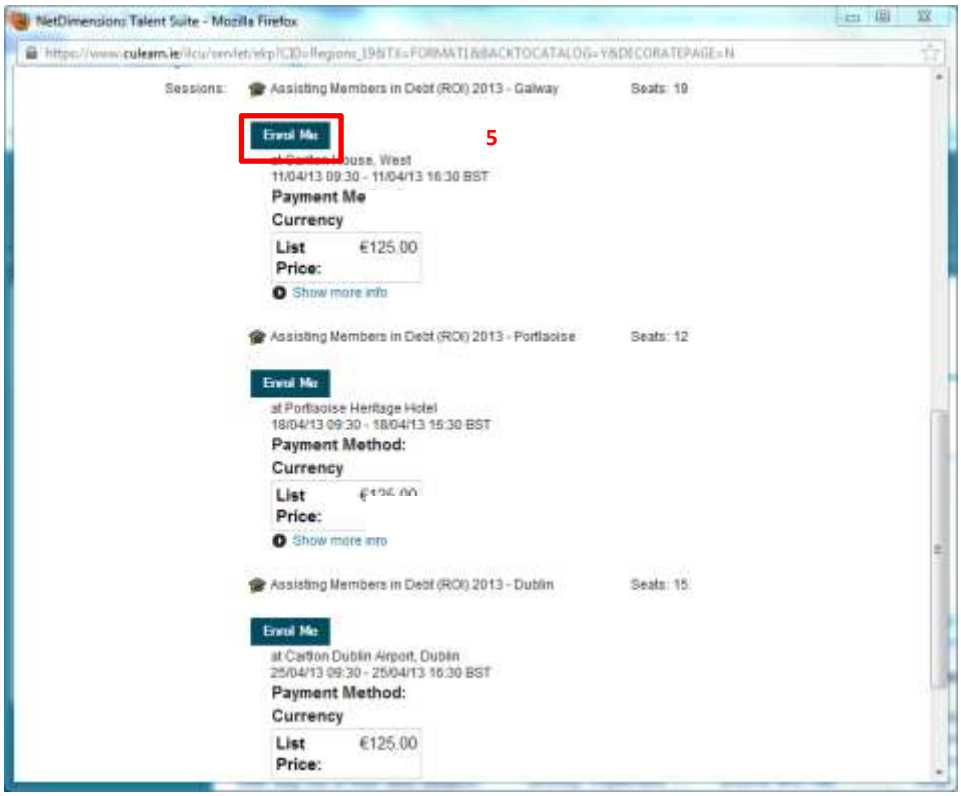

Credit Union
CU Learn
Home Page
Training Courses
Communicate
User Profile
Help
Contact Us
Logout
Training Course
Browse
Find a Course
Course Calendar
All Training Courses >> Autumn Schedule (NI)
Catalogue Content
Results 1 - 6 of 6
3
Assisting Members in Debt (NI)
Court Room Skills (NI)
Credit Control (NI)
Credit Union Operations (NI)
Loans Assessment (NI)
Classroom
Many of our members are suffering great financial burden and cannot see their way out of their debt situation. This in turn impacts on the credit union as it struggles with delinquency, or has to deal ...
This course is offered in response to the increasing demand from credit union staff and volunteers for a better understanding of the processes involved in giving evidence as part of legal proceedings ...
This is a practical and very timely workshop for anyone who operates in credit control and who must contact members to obtain payment. The workshop will explore innovative techniques for achieving max ...
This updated Credit Union Operations Workshop provides a comprehensive overview of core credit union products and services such as membership, shares and loans, internal controls and insurance whilst ...
The Loans Assessment workshop is a fast paced and informative day. Participants will be given practical lending scenarios which will explore the many facets of lending best practice

3.
Click the name of the course you are interested in.


Assisting Members in Debt
Assisting Members in Debt (NI)
4
by Unknown
Session
Many of our members are suffering great financial burden and cannot see their way out of their debt situation. This in turn impacts on the credit union as it struggles with delinquency, or has to deal with unrealistic applications for loans. Early intervention is critical in either case, and can assist the member in identifying practical ways to improve their financial situation.
Learning Type: Classroom
Subject: Regional Training
Language: English
Duration: One-day workshops commence at 9.30am (registration at 9.15am) and conclude at 4pm
Any Certification Exam: No
Who Should Take This: • (NI)Frontline staff, managers, credit controllers, loan officers
Objectives: • Recognise indicators that show a member is in debt
• Know how to approach a member who is demonstrating such indicators and offer assistance
• Utilise a number of practical tools to assist in gathering financial information from members
• Develop a range of practical methods and tips for assisting members in debt
• Recognise how, when and where to refer a member to a skilled adviser
Training Hours: 6.5
CUCPD Hours: 0
Sessions: Assisting Members in Debt (NI)
Seats Available: Unlimited

4.
The **course information screen** will display.

If there is more than one session upcoming for that course clicking the ***Session*** button will show the various venues and dates for that course.



5.
Click ***Enrol Me*** to enrol onto the course.

Note: If the course is full the ***Waitlist*** *option will* display here**.** Clicking this will add you to the waitlist and you will be automatically booked onto the course and notified by email should a place become available for the session.

6.
The screen refreshes with the **enrolment confirmation** information. Check you have selected the right course and date and click ***Confirm Enrolment***. You should receive an email confirming your enrolment.

Note: the CU Learn Coordinator is copied by email on all bookings made on the system.

Book Someone Else on a Course (Coordinator)

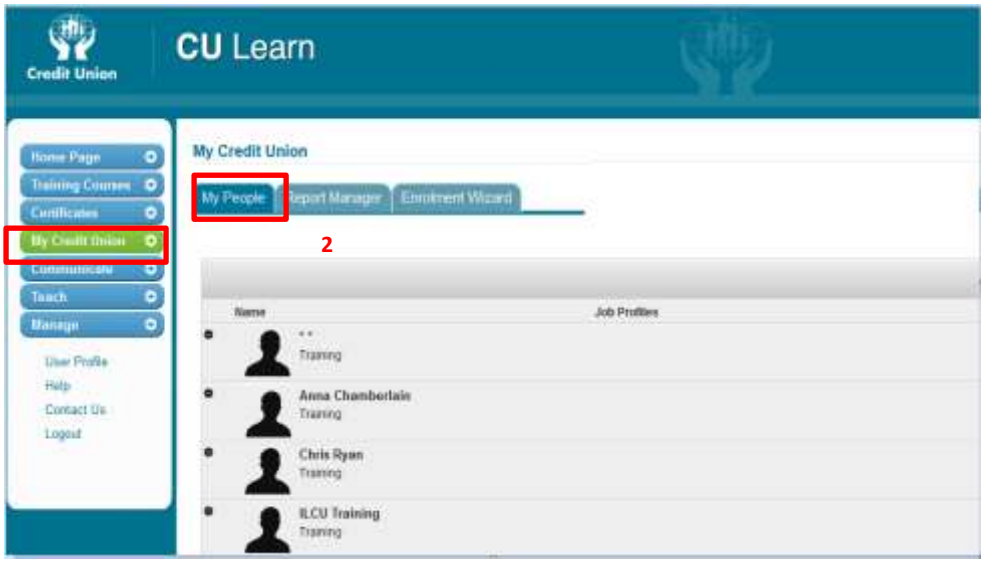
The CU Learn Coordinator can book other users in the credit union onto a course at any time. This is done through the ***My Credit Union*** option from the **Homepage**.

NB

If booking another user onto a course remember to do so from the **My Credit Union** option.

Booking a course from **Training Courses** will book **only you**, the Coordinator, onto that course.

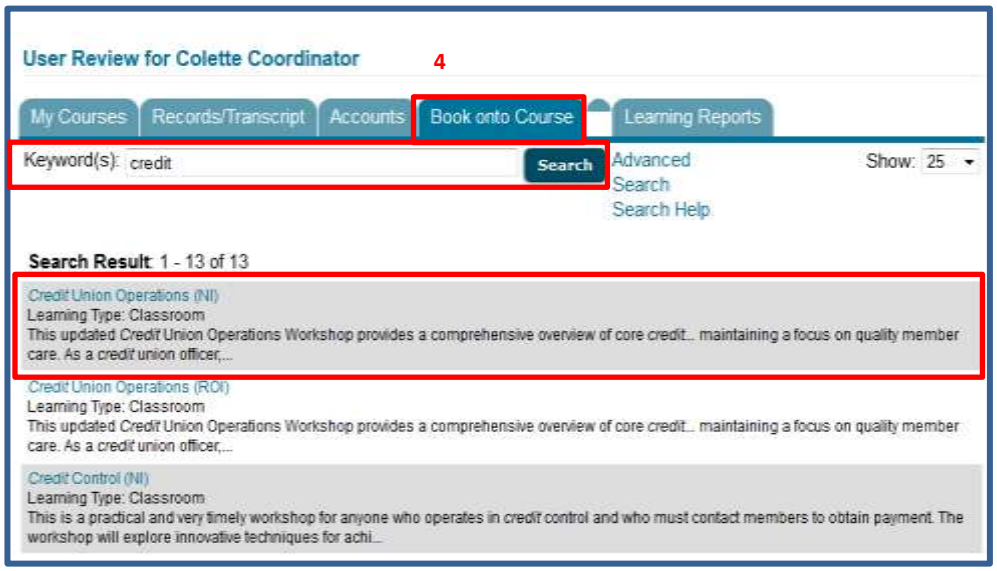
From the CU Learn Homepage:



1.
Click on **My Credit Union**.

2.
Click on the ***My People*** Tab.

3.
Click on the icon beside the name of the person you want to register onto a Course.


User Review for Colette Coordinator
4
My Courses
Records/Transcript
Accounts
Book onto Course
Learning Reports
5
Keyword(s): credit
Search
Advanced Search
Search Help
Show: 25
Search Result: 1 - 13 of 13
6
Credit Union Operations (NI)
Learning Type: Classroom
This updated Credit Union Operations Workshop provides a comprehensive overview of core credit... maintaining a focus on quality member care. As a credit union officer,...
Credit Union Operations (ROI)
Learning Type: Classroom
This updated Credit Union Operations Workshop provides a comprehensive overview of core credit... maintaining a focus on quality member care. As a credit union officer,...
Credit Control (NI)
Learning Type: Classroom
This is a practical and very timely workshop for anyone who operates in credit control and who must contact members to obtain payment. The workshop will explore innovative techniques for achi...

4.
Click on the ***Book onto Course*** tab.

5.
Type all or part of the course name you wish to enrol the User on and click the ***Search*** button

(e.g. Typing "credit" will show all courses with the word credit in the title).

6.
Click on the chosen course name.

NetDimensions Talent Suite - Mozilla Firefox
Who Should Take This:
Credit Union front line staff in Northern Ireland wishing to develop their understanding of core credit union products and services. It is ideally suited to officers within the first year of their role with the credit union or anyone who would benefit from an operational update.
Withdrawal Policy:
Below is the number of days before the course start date and the percentage of refund you will receive should you withdraw.
1 or more days = 50% refunded
7 or more days = 100% refunded
Objectives:
Know the legal, new regulatory and ethical framework in which the credit union operates
Be familiar with credit union membership requirements such as the common bond and legal identification requirements
Understand core activities such as shares, loans and nominations
Know the importance of internal controls in protecting the credit union, its members and officers
CUCPD-Hours: 4
Training-Hours: 6.5
Participants:
Sessions:
Credit Union Operations (NI) 2013 - Cookstown
Seats: 16
Enrol Users
7
at Glenavon Hotel, North
13/02/13 09:30 - 13/02/13 16:30 GMT
Payment Method:
Currency
List Price: £100.00
Show more info
Close
to top of page

7.
Another popup window will appear with the details for your chosen course. Scroll down to the Sessions area and click the ***Enrol Users*** button.

8.
Confirm the enrolment on the next screen and click ***Close***.

NB

Although the Coordinator can book someone onto a course, only the User can withdraw from a course (see Section 4.3 below). If a User is unable to withdraw from a course contact CU L&D at culearn@creditunion.ie at least one week before the course date.

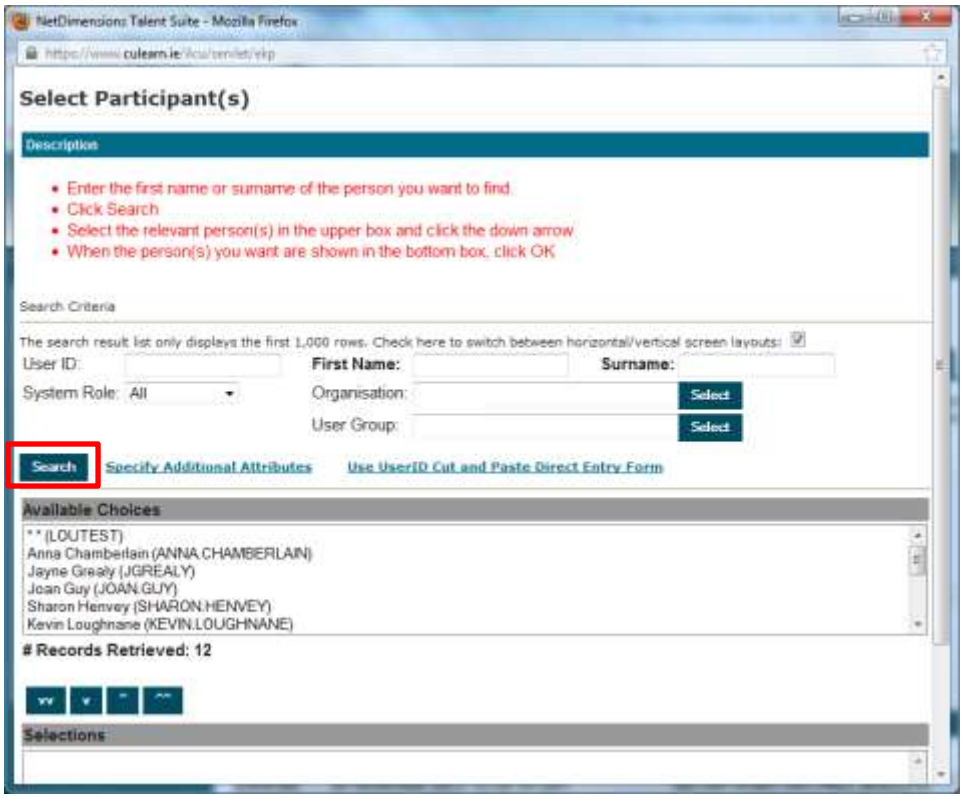
Book more than one person on a Course (Coordinator)

To book more than one person in your credit union onto a course, it is quicker to use the **Enrolment Wizard**.

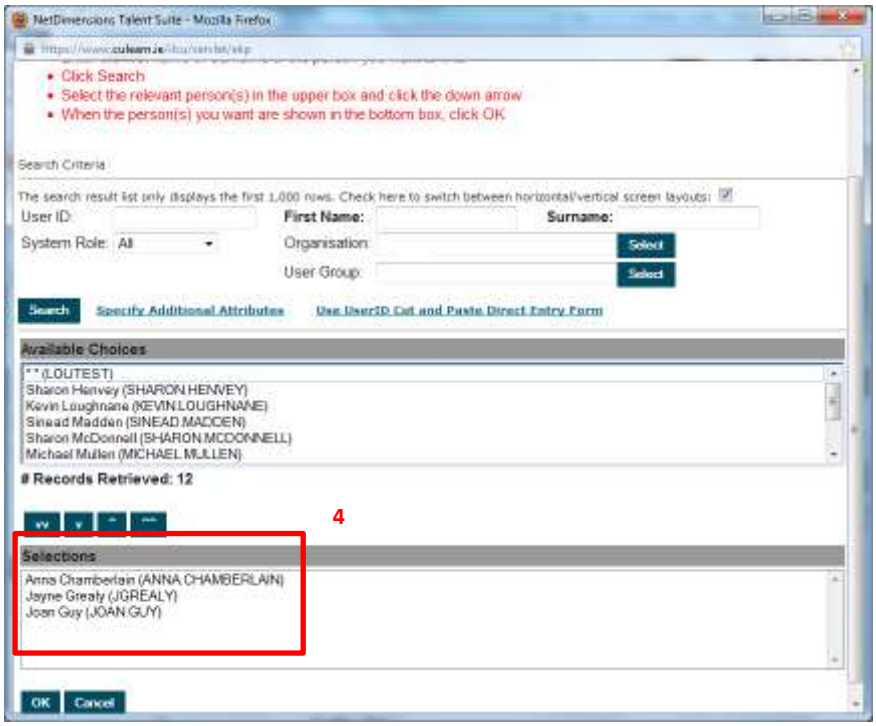
From **My Credit Union:**

1.
Click the **Enrolment Wizard** tab.

2.
Click **Select participants(s)** to select the people that you want to enrol on the course.


NetDimensions Talent Suite - Mozilla Firefox
Select Participant(s)
Description
• Enter the first name or surname of the person you want to find
• Click Search
• Select the relevant person(s) in the upper box and click the down arrow
• When the person(s) you want are shown in the bottom box, click OK
Search Criteria
The search result list only displays the first 1,000 rows. Check here to switch between horizontal/vertical screen layouts:
User ID:
First Name:
Surname:
System Role: All
Organisation:
User Group:
Select
Select
3
Search
Specify Additional Attributes
Use UserID Cut and Paste Direct Entry Form
Available Choices
* * (LOUTEST)
Anna Chamberlain (ANNA.CHAMBERLAIN)
Jayne Grealy (JGREALY)
Joan Guy (JOAN.GUY)
Sharon Henvey (SHARON.HENVEY)
Kevin Loughnane (KEVIN.LOUGHNANE)
Records Retrieved: 12
Selections

3.
Click the **Search** button to return a list of all people in your credit union in the *Available Choices* box below.

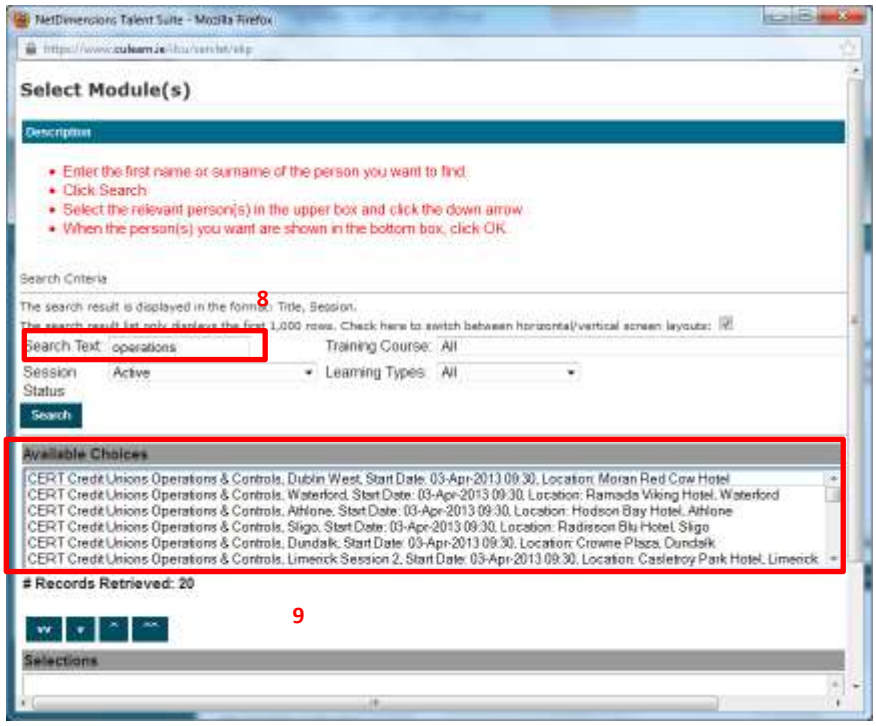


4.
To select the participants you want to enrol on the course, double-click each name so that it appears in the *Selections* box below.

5.
Click **OK** when you have selected all required participants.

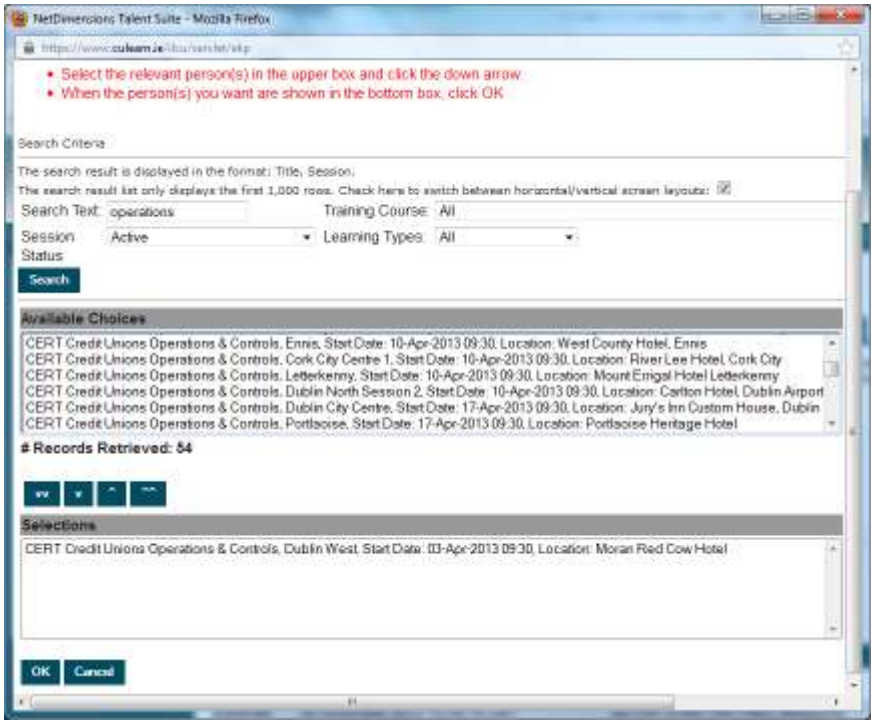
6.
In the **Action** dropdown box, select **Enrol Me.**

7.
To select the required course, click **Select Module(s)**.


NetDimensions Talent Suite - Mozilla Firefox
Select Module(s)
Description
• Enter the first name or surname of the person you want to find.
• Click Search.
• Select the relevant person(s) in the upper box and click the down arrow.
• When the person(s) you want are shown in the bottom box, click OK.
Search Criteria
8
The search result is displayed in the format: Title, Session.
Search Text: operations
Training Course: All
Session Status: Active
Learning Types: All
Search
Available Choices
CERT Credit Unions Operations & Controls, Dublin West, Start Date: 03-Apr-2013 09:30, Location: Moran Red Cow Hotel
CERT Credit Unions Operations & Controls, Waterford, Start Date: 03-Apr-2013 09:30, Location: Ramada Viking Hotel, Waterford
CERT Credit Unions Operations & Controls, Athlone, Start Date: 03-Apr-2013 09:30, Location: Hodson Bay Hotel, Athlone
CERT Credit Unions Operations & Controls, Sligo, Start Date: 03-Apr-2013 09:30, Location: Radisson Blu Hotel, Sligo
CERT Credit Unions Operations & Controls, Dundalk, Start Date: 03-Apr-2013 09:30, Location: Crowne Plaza, Dundalk
CERT Credit Unions Operations & Controls, Limerick Session 2, Start Date: 03-Apr-2013 09:30, Location: Castletroy Park Hotel, Limerick
Records Retrieved: 20
9
Selections

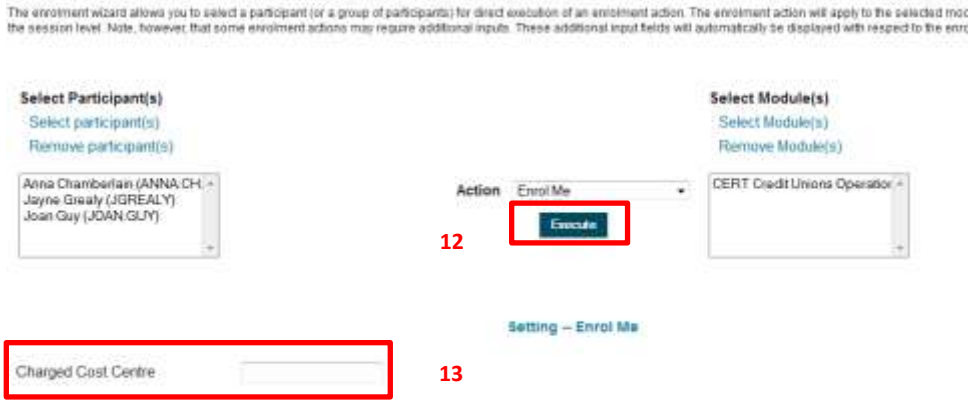
8.
In the **Search Text** field, enter the name of the course you are looking for e.g. “operations”.

9.
A list of courses is displayed in the **Available Choices** box.


NetDimensions Talent Suite - Mozilla Firefox
• Select the relevant person(s) in the upper box and click the down arrow.
• When the person(s) you want are shown in the bottom box, click OK.
Search Criteria
The search result is displayed in the format: Title, Session.
Search Text: operations
Training Course: All
Session Status: Active
Learning Types: All
Search
Available Choices
CERT Credit Unions Operations & Controls, Ennis, Start Date: 10-Apr-2013 09:30, Location: West County Hotel, Ennis
CERT Credit Unions Operations & Controls, Cork City Centre 1, Start Date: 10-Apr-2013 09:30, Location: River Lee Hotel, Cork City
CERT Credit Unions Operations & Controls, Letterkenny, Start Date: 10-Apr-2013 09:30, Location: Mount Errigal Hotel Letterkenny
CERT Credit Unions Operations & Controls, Dublin North Session 2, Start Date: 10-Apr-2013 09:30, Location: Carlton Hotel, Dublin Airport
CERT Credit Unions Operations & Controls, Dublin City Centre, Start Date: 17-Apr-2013 09:30, Location: Jury's Inn Custom House, Dublin
CERT Credit Unions Operations & Controls, Portlaoise, Start Date: 17-Apr-2013 09:30, Location: Portlaoise Heritage Hotel
Records Retrieved: 84
Selections
CERT Credit Unions Operations & Controls, Dublin West, Start Date: 03-Apr-2013 09:30, Location: Moran Red Cow Hotel
OK
Cancel

10.
Double-click the required course so that it appears in the *Selections* box below.

11.
Click **OK**.


The enrolment wizard allows you to select a participant (or a group of participants) for direct execution of an enrolment action. The enrolment action will apply to the selected mod
the session level. Note, however that some enrolment actions may require additional inputs. These additional input fields will automatically be displayed with respect to the enro
Select Participant(s)
Select participant(s)
Remove participant(s)
Anna Chamberlain (ANNA.CH
Jayne Grealy (JGREALY)
Joan Guy (JOAN.GUY)
Action
Enrol Me
Execute
12
Select Module(s)
Select Module(s)
Remove Module(s)
CERT Credit Unions Operation

12.
Click **Execute** to enrol all selected participants.

13.
Note: Leave the *Charged Cost Centre* field blank.

Below is a summarised report of the number of modules, per user, processed by the enrolment wizard for the 'Enrol Me' action.
Gradebook
Number of records SUCCESSFULLY processed: 2
Number of records which FAILED: 0
Back to Enrolment Wizard

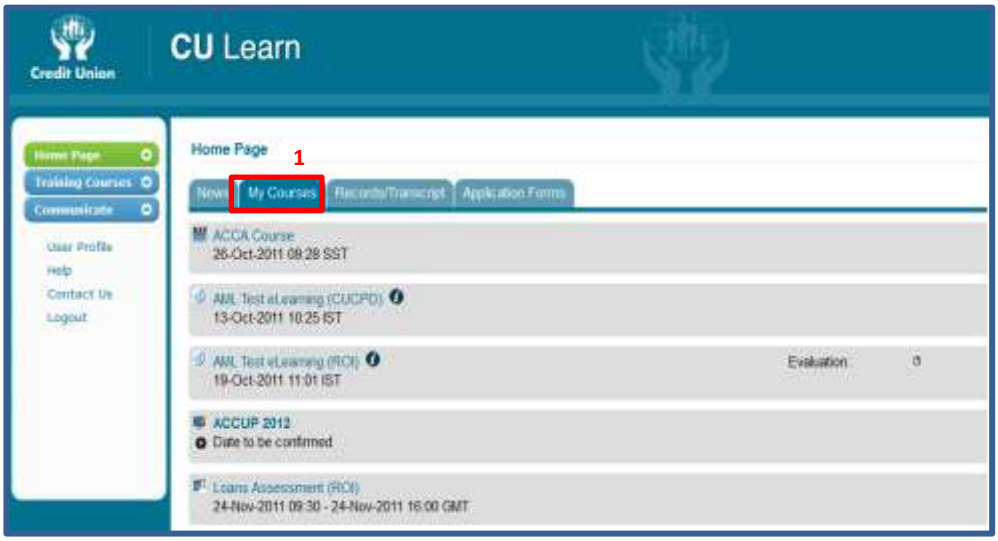
A message is displayed once the enrolment is complete.

Withdraw from a Course (User)

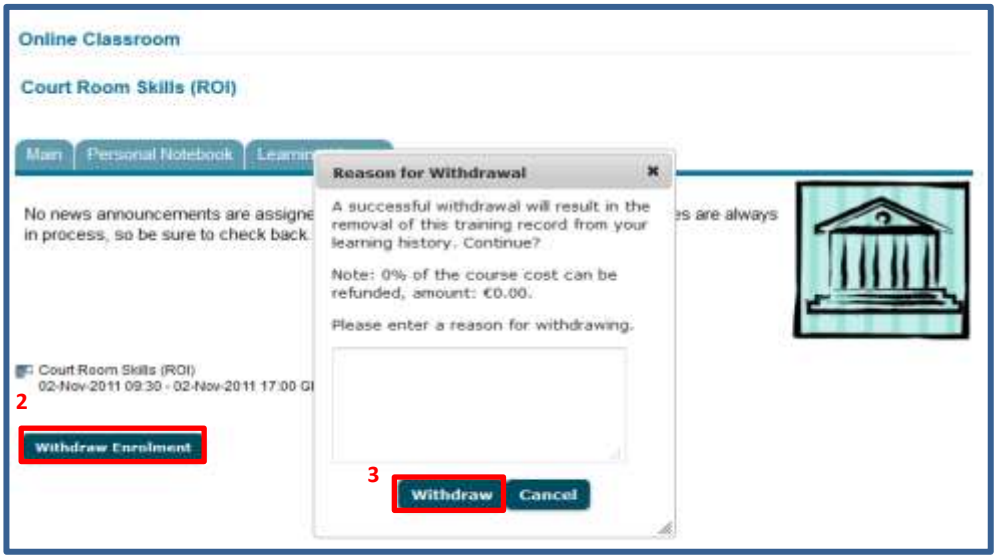
If for any reason a user needs to withdraw from a course, they can do so by following the steps below.

Note: only the User can withdraw from a course.

From the CU Learn Homepage:



1.
Click on ***My Courses*** tab on the homepage and click the course name you want to withdraw from.


Online Classroom
Court Room Skills (ROI)
Main
Personal Notebook
Reason for Withdrawal
A successful withdrawal will result in the removal of this training record from your learning history. Continue?
Note: 0% of the course cost can be refunded, amount: €0.00.
Please enter a reason for withdrawing.
No news announcements are assigne
in process, so be sure to check back.
Court Room Skills (ROI)
02-Nov-2011 09:30 - 02-Nov-2011 17:00 GI
2
Withdraw Enrolment
3
Withdraw
Cancel

2.
Click ***Withdraw Enrolment***.

3.
A popup window may appear asking you to provide a reason for your cancellation.

Enter your reason and click ***Withdraw***.

You have successfully withdrawn your enrolment on the Course. You and your CU Learn Coordinator will receive an email confirming your withdrawal.

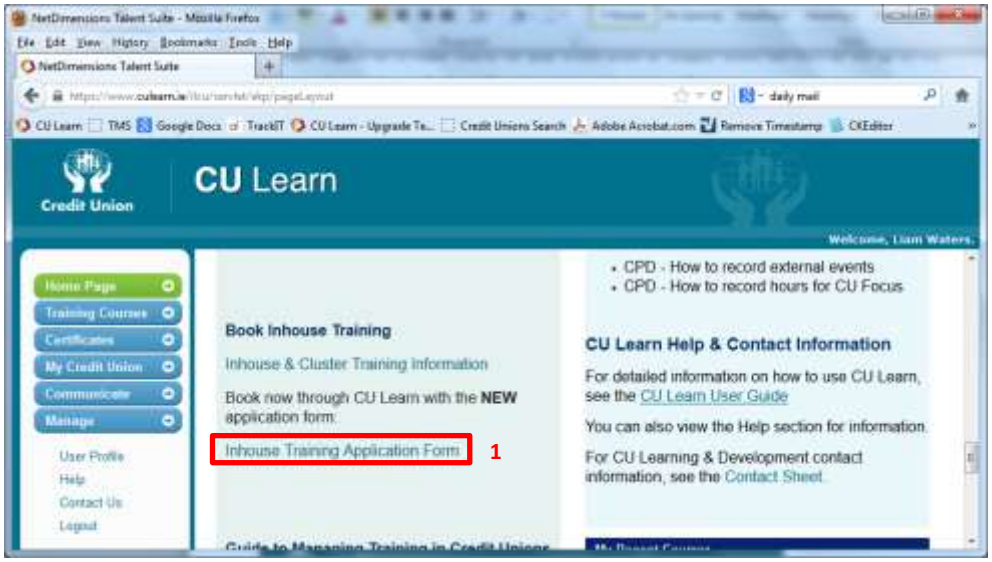
NB

Withdrawals are typically free of charge up to one week ahead of courses. There will be a cancellation fee if withdrawals are made within one week of the course start date. Substitutions are normally permitted up to the time of the event. Please refer to the cancellation policy on CU Learn for more information.

Request In-house Course for your Credit Union or Chapter

You can request an in-house course for your credit union or chapter which can then be set up on the system and opened up to those credit unions you want to invite to the course.

From the CU Learn Homepage:


CU Learn
Credit Union
Welcome, Liam Waters.
Home Page
Training Courses
Certificates
My Credit Union
Communicate
Manage
User Profile
Help
Contact Us
Logout
Book Inhouse Training
Inhouse & Cluster Training Information
Book now through CU Learn with the NEW application form:
Inhouse Training Application Form
1
CPD - How to record external events
CPD - How to record hours for CU Focus
CU Learn Help & Contact Information
For detailed information on how to use CU Learn, see the CU Learn User Guide
You can also view the Help section for information
For CU Learning & Development contact information, see the Contact Sheet

1.
On the CU Learn home page, click the **Inhouse Training Application Form** link.

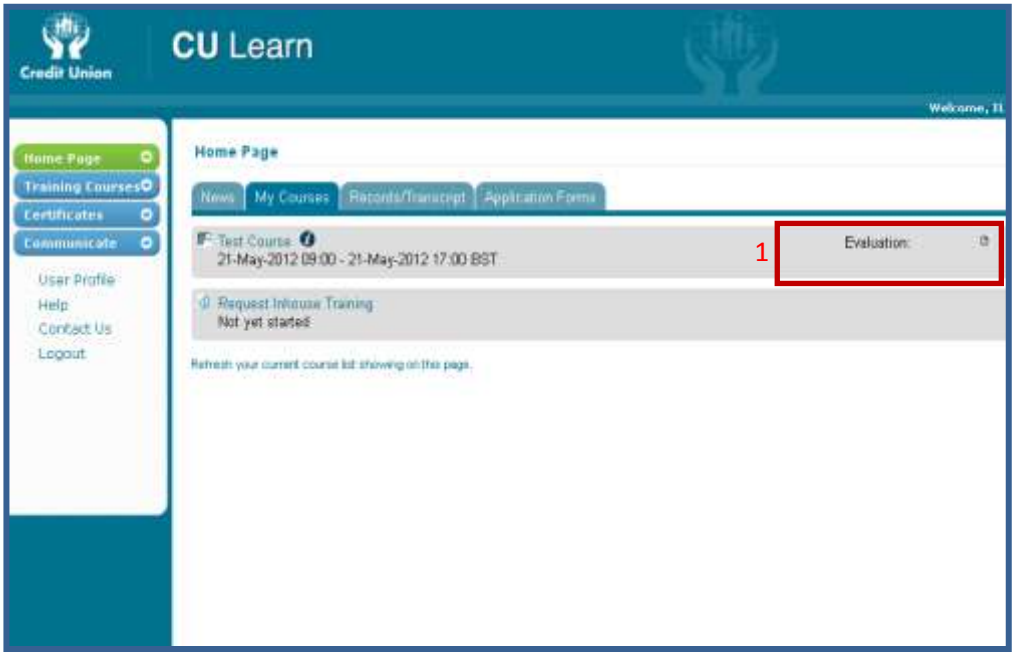
ILCU Inhouse Training Application Form
Please allow up to three days for ILCU to confirm your event.
IMPORTANT: Do not advertise your event until you receive this confirmation.
*Required
Enter your credit union. *
Enter your name and contact number. *
Enter your email address.
Where will the training be held, either at the credit union, or please state if another venue? *

2.
The *ILCU Inhouse Training Application Form* is displayed.
Complete the form as appropriate, paying attention to the information on the form. When ready, click **Submit**.
CU L&D will then contact you to confirm details for the inhouse course.

Complete an Evaluation for a Course

Course evaluations can now be completed online via CU Learn. Once you have attended a course your attendance will be marked and you will also have access to the online evaluation for that course. Evaluations take only a couple of minutes and are important for the on-going quality of the courses ILCU deliver. To complete an evaluation, select **My Courses** from the CU Learn Home Page and do the following:

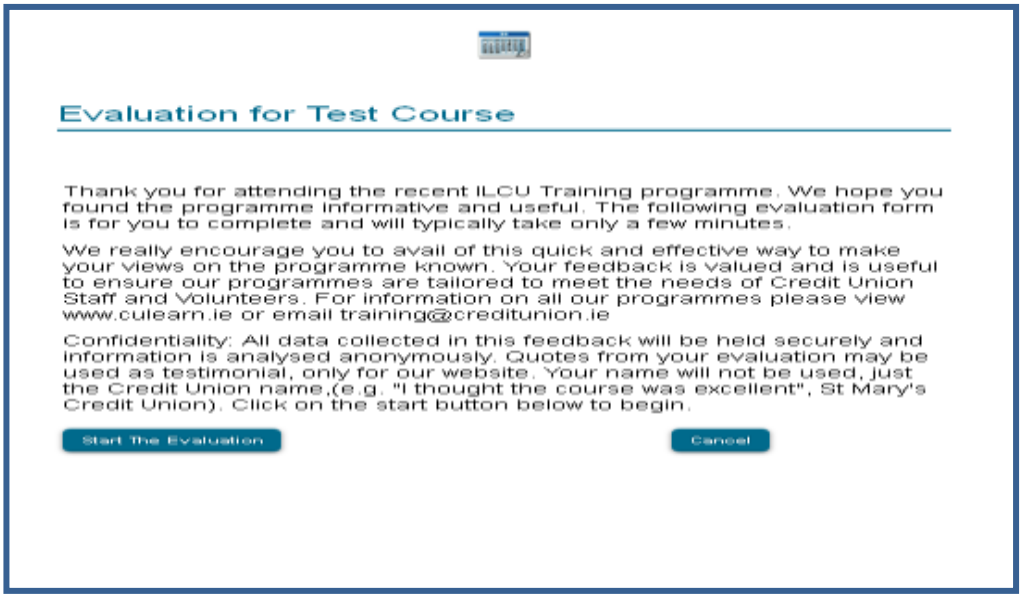
From the CU Learn Homepage:



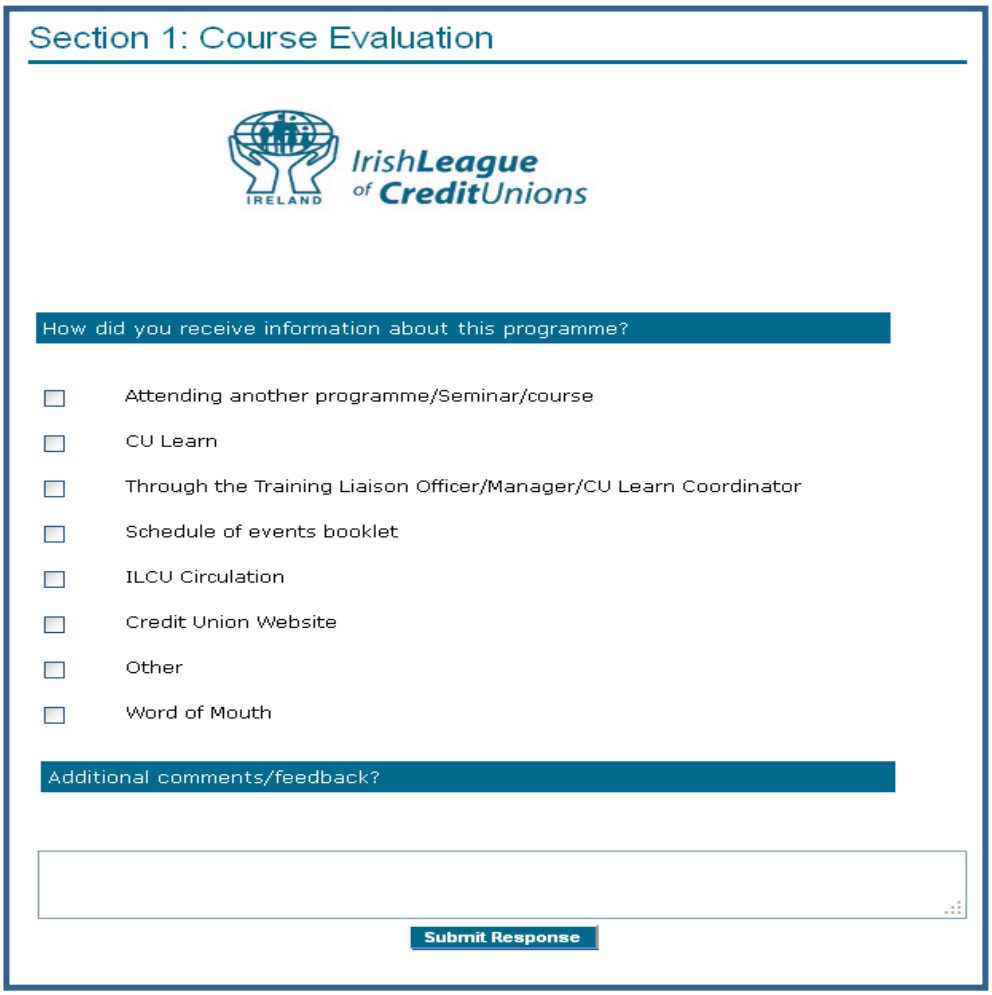
1.
Click ***Evaluation.***

(If the course was run some time ago it may not appear under ***My Courses***, but instead be stored under the ***Records/Transcript*** tab).

To evaluate an older course go to ***Records/Transcript***, select the ***reopen course*** option beside the course you wish to evaluate and the course will be placed back in the ***My Courses*** tab


Evaluation for Test Course
Thank you for attending the recent ILCU Training programme. We hope you found the programme informative and useful. The following evaluation form is for you to complete and will typically take only a few minutes.
We really encourage you to avail of this quick and effective way to make your views on the programme known. Your feedback is valued and is useful to ensure our programmes are tailored to meet the needs of Credit Union Staff and Volunteers. For information on all our programmes please view www.culearn.ie or email training@creditunion.ie
Confidentiality: All data collected in this feedback will be held securely and information is analysed anonymously. Quotes from your evaluation may be used as testimonial, only for our website. Your name will not be used, just the Credit Union name,(e.g. "I thought the course was excellent", St Mary's Credit Union). Click on the start button below to begin.
Start The Evaluation
Cancel

2.
Click ***Start Evaluation***



3.

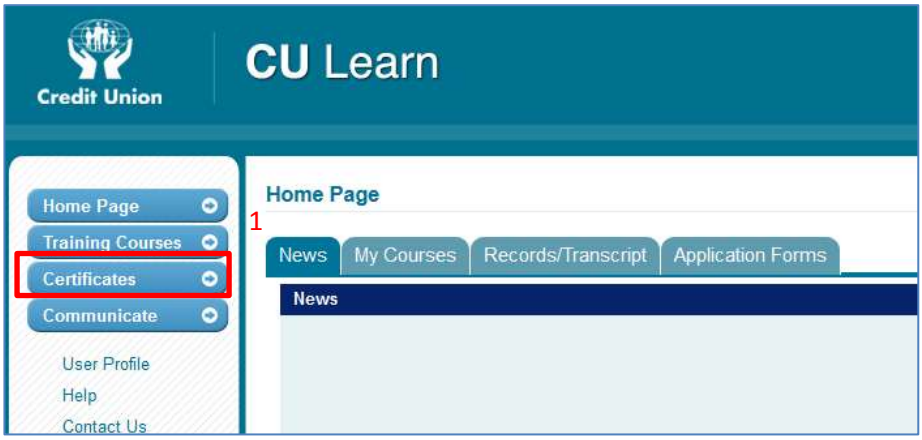
Answer all the questions and when finished remember to click on ***Submit Response***.

Certificates

Print a CPD Certificate (User)

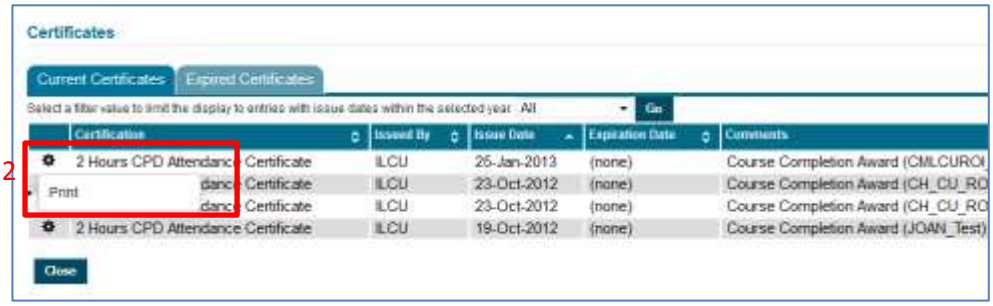
When you complete training that has CPD hours awarded for attendance, CU Learn automatically emails you a copy of the certificate. The system also updates your account with the certificate, so that you can print it at any time.

To print a CPD certificate from CU Learn:



1.

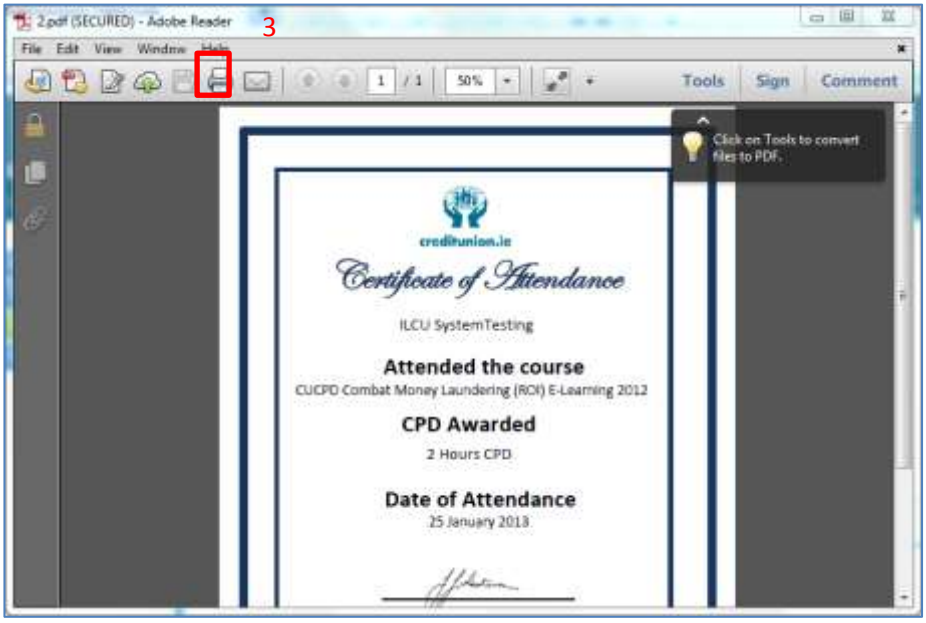
Click **Certificates**.



2.

A list of certificates is displayed.

Click the "cog" icon to left of the certificate, and then click **Print**.



3.

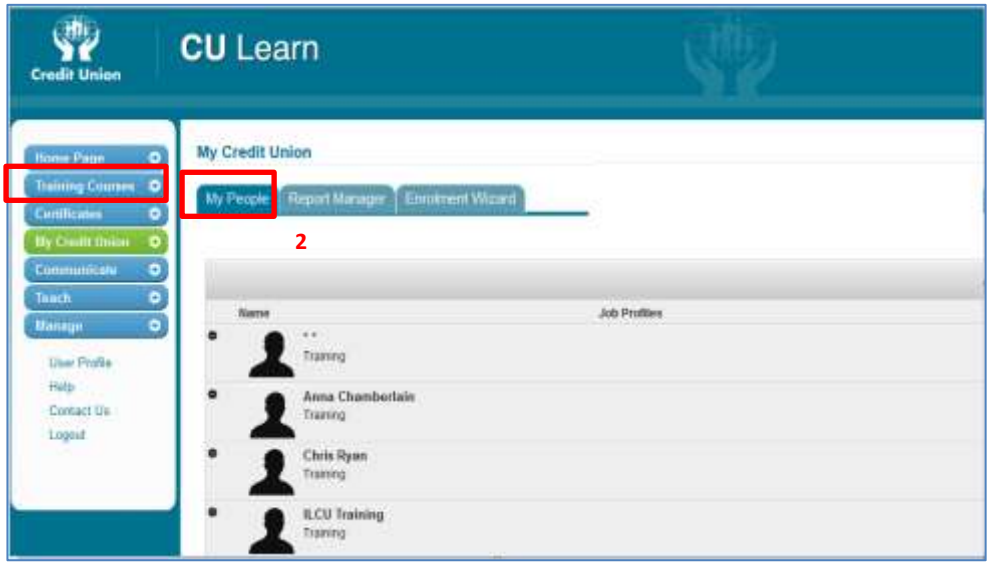
The certificate is displayed in Adobe Reader, and can be printed from here.

If you do not have Adobe Reader, you can download it for free from www.adobe.com.

Print a CPD Certificate for another user (Coordinator)

Coordinators can print certificates for other users in their credit union. To print a certificate for another user:

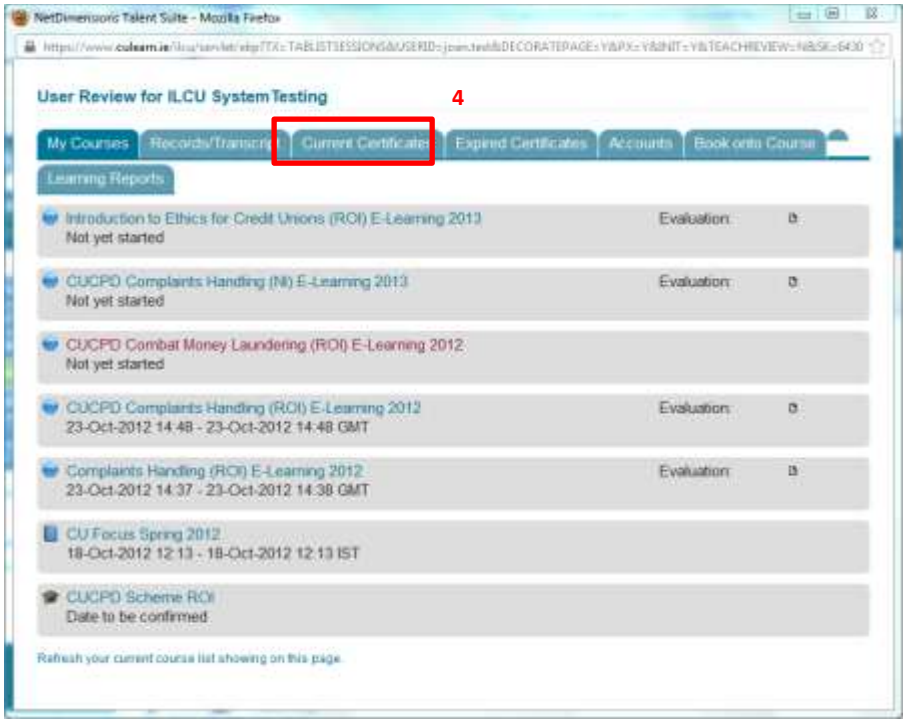
From the CU Learn Homepage:



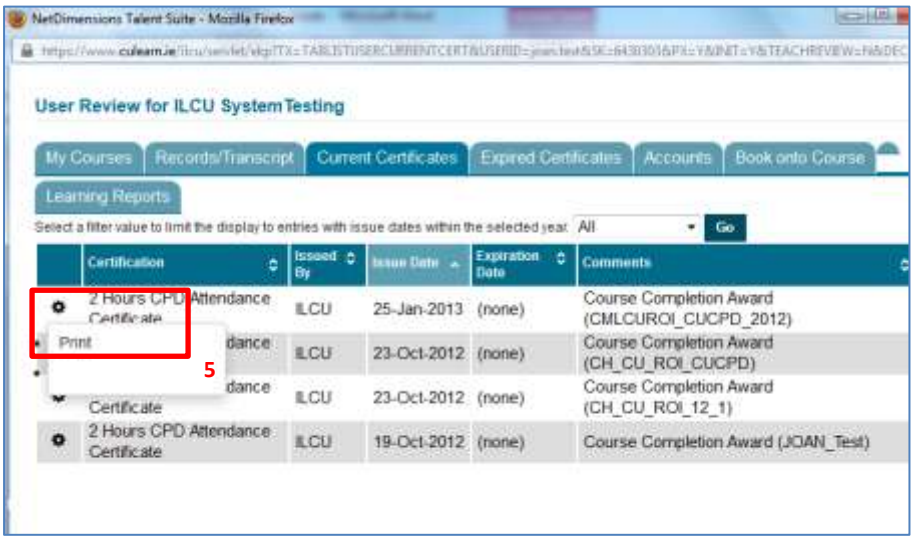
1.
Click on **My Credit Union**.

2.
Click on the ***My People*** tab.

3.
Click the icon beside the name of the person for whom you need a certificate.

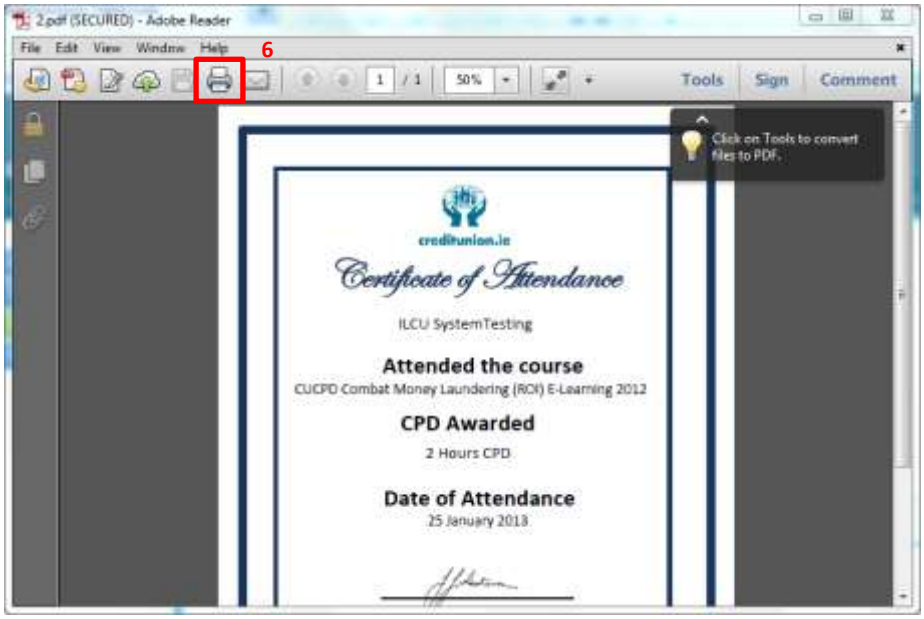


4.
Click the **Current Certificates** tab to display a list of certificates for the user.



5.
A list of certificates is displayed.

Click the "cog" icon to left of the certificate, and then click **Print**.



6.

The certificate is displayed in Adobe Reader, and can be printed from here.

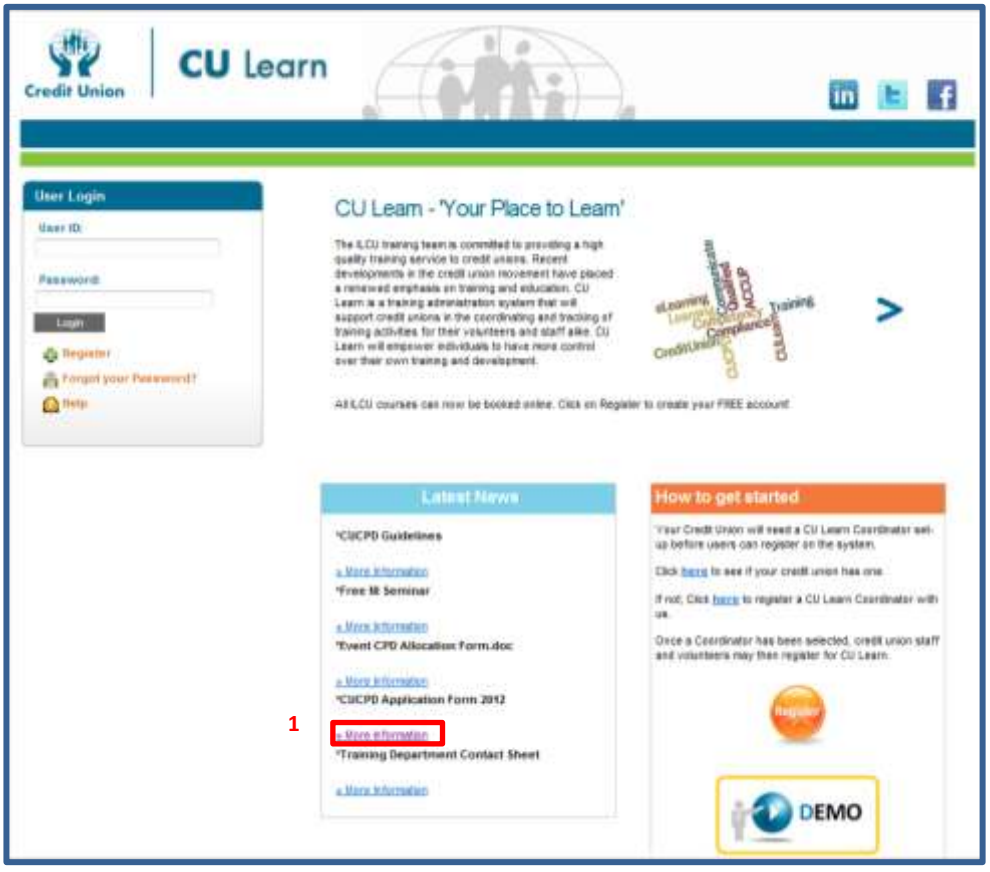
CU CPD Members

Apply for CU CPD Membership (User)

Users can apply for membership of the ILCU's *CU CPD scheme* by filling out the application form. CU L & D will then process the application and send an email confirming enrolment. Please allow 10 working days for applications to be processed.

Once a CU CPD application has been processed, the user's rights will be changed and they will have full access to the CU CPD members' area of the system, including free e-Learning, CU CPD records and automated returns.

From the CU Learn Log In Page:


Credit Union
CU Learn
User Login
User ID:
Password:
Login
Register
Forgot your Password?
Help
CU Learn - 'Your Place to Learn'
The ILCU training team is committed to providing a high quality training service to credit unions. Recent developments in the credit union movement have placed a renewed emphasis on training and education. CU Learn is a training administration system that will support credit unions in the coordinating and tracking of training activities for their volunteers and staff alike. CU Learn will empower individuals to have more control over their own training and development.
All ILCU courses can now be booked online. Click on Register to create your FREE account
Latest News
*CUCPD Guidelines
» More Information
*Free MI Seminar
» More Information
*Event CPD Allocation Form.doc
» More Information
*CUCPD Application Form 2012
» More Information
*Training Department Contact Sheet
» More Information
How to get started
Your Credit Union will need a CU Learn Coordinator set-up before users can register on the system.
Click here to see if your credit union has one.
If not, Click here to register a CU Learn Coordinator with us.
Once a Coordinator has been selected, credit union staff and volunteers may then register for CU Learn.
Register
DEMO
1

1.
Click the ***More Information*** tab below ***CUCPD Application*** for the current year**.**

2

2.
Right Click the Link.
Select the option that you require.

e.g: "Save Target as" then save to your desktop.

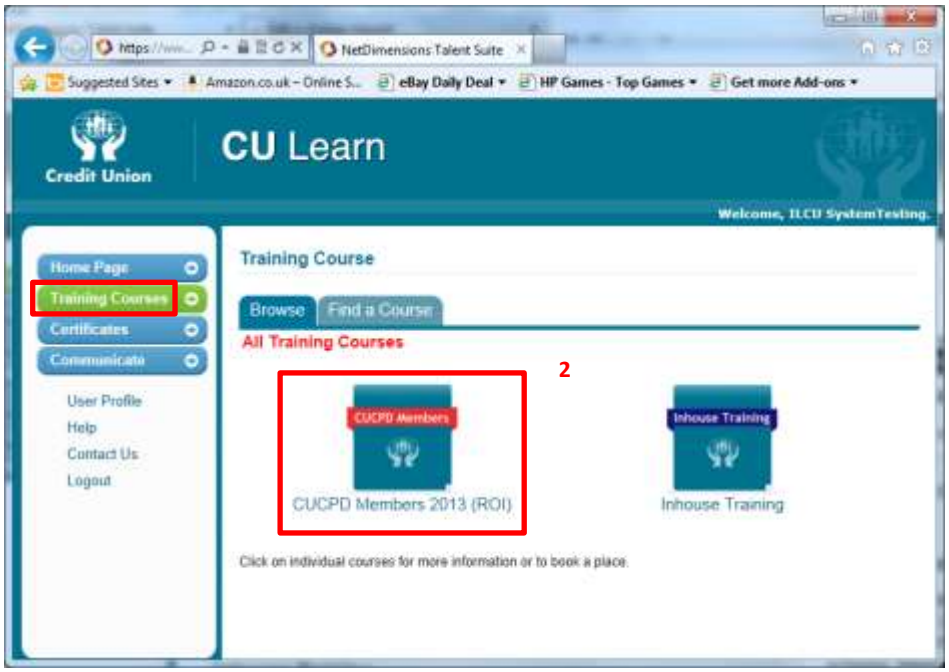
NB

Please ensure that the application form you submit relates to the year in which you wish your CU CPD Membership to commence. For instance, should you submit a 2013 application form, your membership will commence for the year 2013 regardless of the time of year you submit.

Add Non-ILCU CPD hours to a CU CPD Record (User)

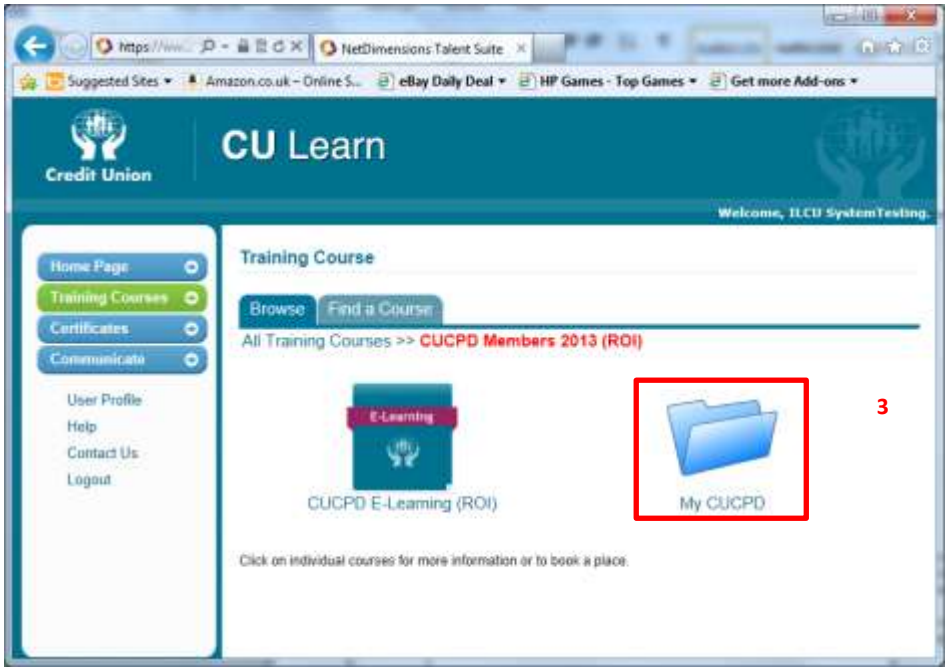
CU Learn allows CPD Members to add CPD hours from approved non-ILCU courses. You should read the External CUCPD Hours guidelines in Step 8 carefully before adding any external hours. ILCU courses are automatically added to your CUCPD record.

From the CU Learn Homepage:



1.
From the Home Page click **Training Courses**.

2.
Click the **CUCPD Members 2013** folder.



3.
Click the **My CUCPD** folder.

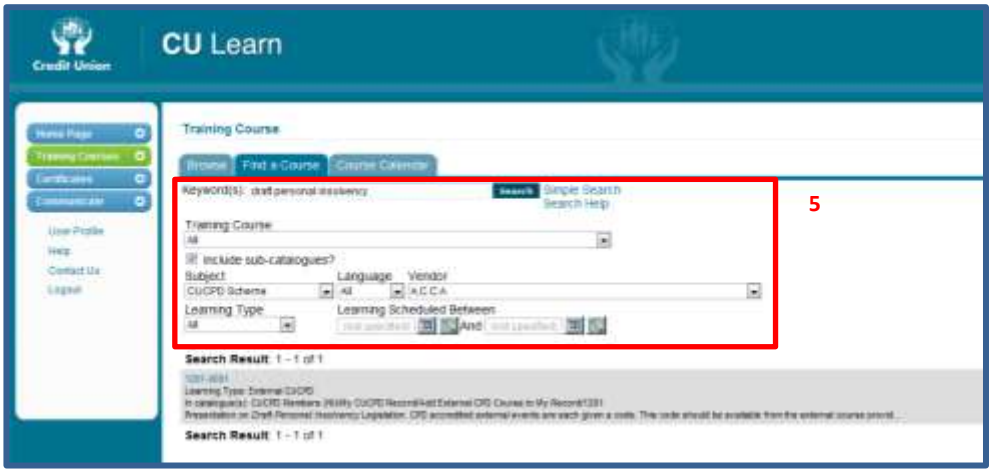
4.
Click **Add External CPD Course to My Record**.

Option A – if you have the unique CPD Accreditation Number:

4.
Type in the CPD accreditation number and click search, this will return your event.

Click on the returned course title.

Option B – if you do not know the unique CPD Accreditation Number

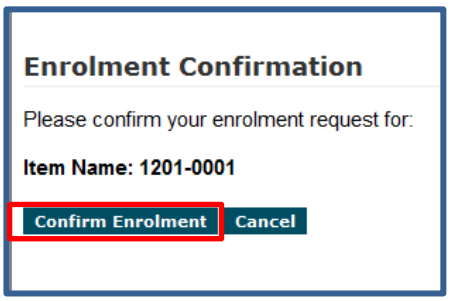


5.
Once you have clicked "Advanced Search"
You can now type in the keywords for the event you wish to find.

In the Subject area, select CUCPD Scheme.
In the Vendor area select your vendor.
Click search and this will return your event.

Click on the returned course title.

6.
Click on **Enrol Me** to add this course to your record.

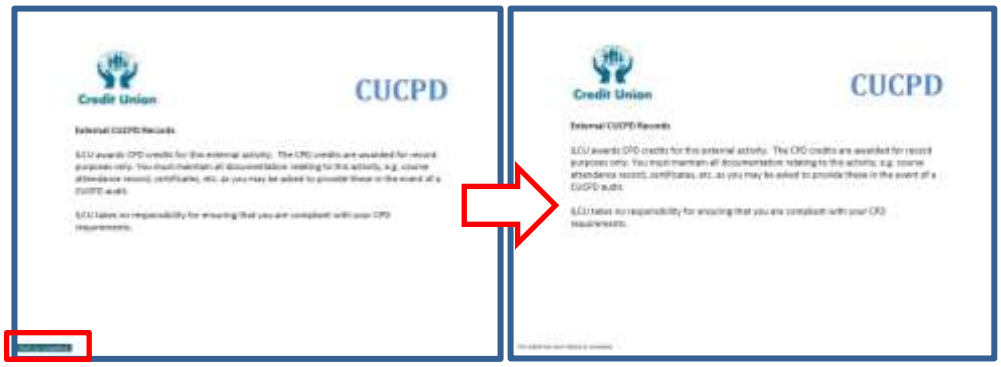


7.
Once you have enrolled click **Confirm Enrolment**.

Enrolment Successful
Your enrolment was successful!
Please examine your e-mail messages for any pre-class instructions.
8
Go to Course Sessions

8.
Click on **Go to Course Sessions** to begin the course.

You will see a list of courses you are enrolled on, click on the course title.



9

9.
Read the external CPD guidelines carefully, click **Mark as Completed** and close the window. The hours are now added to your CUCPD record.

NB

If your course provider has not given you a CUCPD accreditation number, you can apply to CU L&D to have the course approved. To do so, use the **External CPD Hours** application form, found on the CU Learn Log in Page in the "Latest News" section.

Users must maintain their own records of any external CPD event available for audit at any time.

Add Pro Rata CPD hours to a CU CPD Record (User)

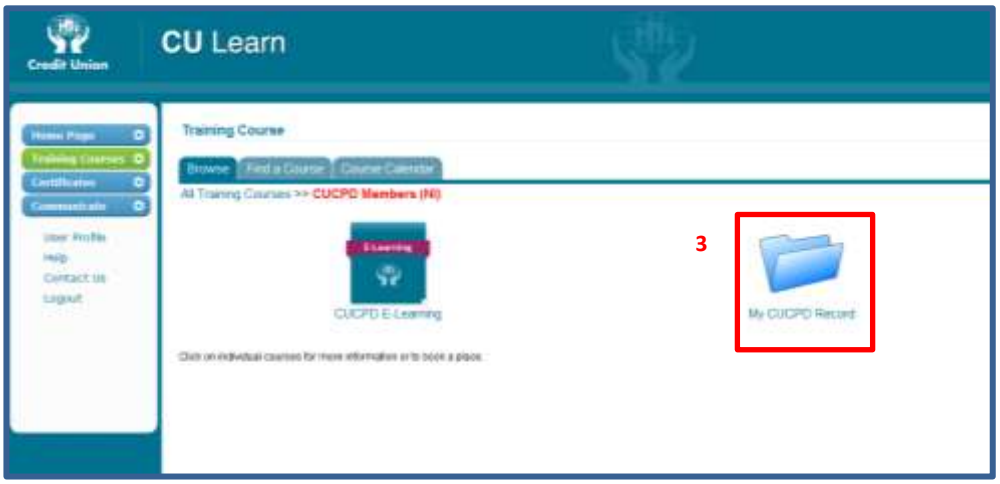
CU Learn allows CU CPD Members to claim for a reduction in CPD hours for certified periods of leave, such as maternity/parental/carer's leave, or for periods of certified illness (in excess of two months).

You should read the guidelines in Step 10 carefully before adding any hours.

From the CU Learn Homepage:

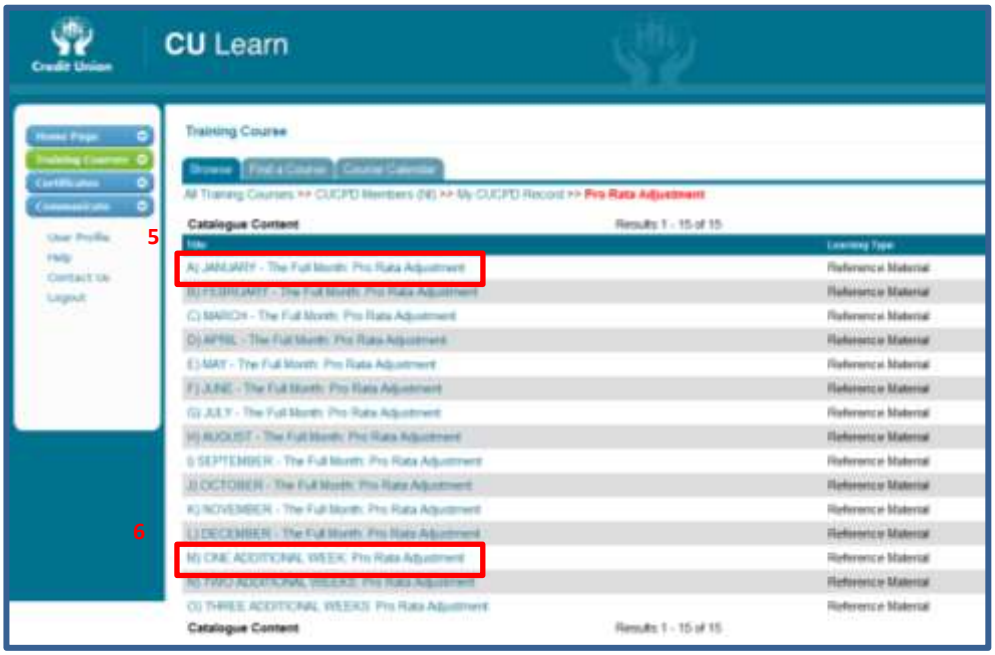
1.
On the left menu click **Training Courses**.

2.
Click the CUCPD catalogue that refers to your location e.g. **CUCPD Members (NI).**



3.
Click **My CPD Record.**

4.
Click the
Pro Rata Adjustment
catalogue.


CU Learn
Training Course
All Training Courses >> CUCPD Members (98) >> My CUCPD Record >> Pro Rata Adjustment
Catalogue Content
Results 1 - 15 of 15
5
A) JANUARY - The Full Month: Pro Rata Adjustment
6
N) ONE ADDITIONAL WEEK: Pro Rata Adjustment
Catalogue Content
Results 1 - 15 of 15

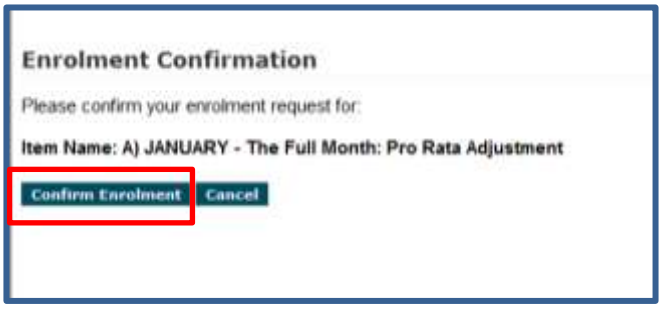
5.
Click on the month for which you wish to claim a full month reduction. These steps must be repeated for each additional month you are claiming.

6.
Where a full month cannot be claimed, please click each additional week you wish to claim.

Please round weeks off so that 1-2 days would be 0 and 3-5 days would be one additional week.

7.
Click on **Enrol Me** to add this pro rata adjustment to your record.

8


Enrolment Confirmation
Please confirm your enrolment request for:
Item Name: A) JANUARY - The Full Month: Pro Rata Adjustment
Confirm Enrolment
Cancel

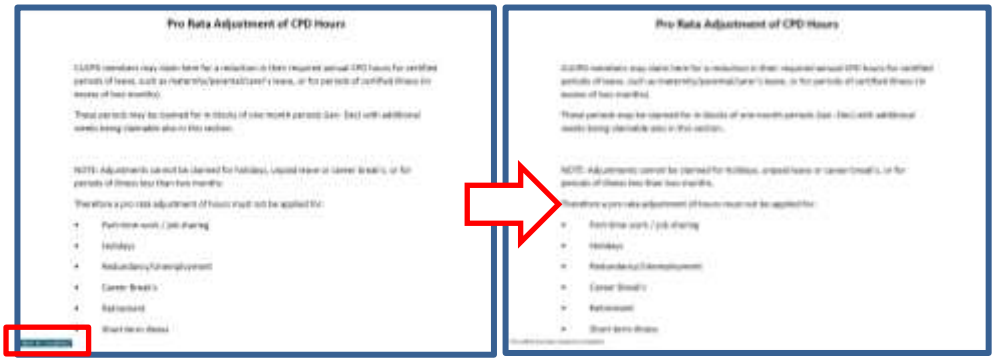
8.
Once you have enrolled click **Confirm Enrolment**.

Enrolment Successful
Your enrolment was successful!
Please examine your e-mail messages for any pre-class instructions.
9
Go to Course Sessions

9.
Click on **Go to Course Sessions** to assign the hours.

You will see a list of courses you are enrolled on, click on the course title.

10



10.
Read the Pro Rata guidelines carefully, click **Mark as Completed** and close the window. The hours are now added to your CUCPD record.

NB

Please note there is no reduction for part-time working or voluntary status, or for uncertified periods of leave such as holidays or career breaks. Those claiming pro-rata reductions are required to maintain documentation, (i.e. credit union letters, sick certificates etc.) to substantiate any claim for reductions in required CPD hours. ILCU maintains the right to check any claim for CPD reduction

Add CU Focus to a CU CPD Record (User)

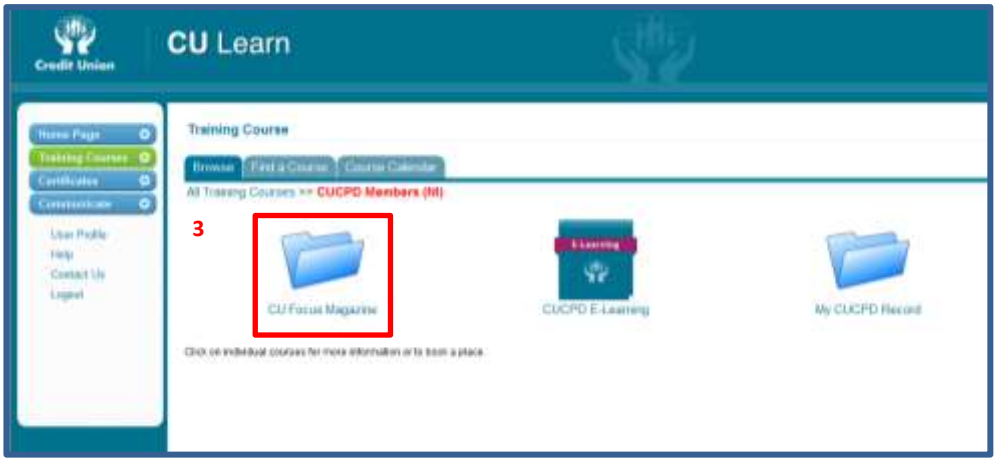
CU Learn allows CU CPD Members to claim for the reading of CU Focus Magazine.

You should read the guidelines in Step 9 carefully before adding any hours.

From the CU Learn Homepage:

1.
From the Home Page click **Training Courses**.

2.
Click the CUCPD Members catalogue.
Your screen will only show your jurisdiction.



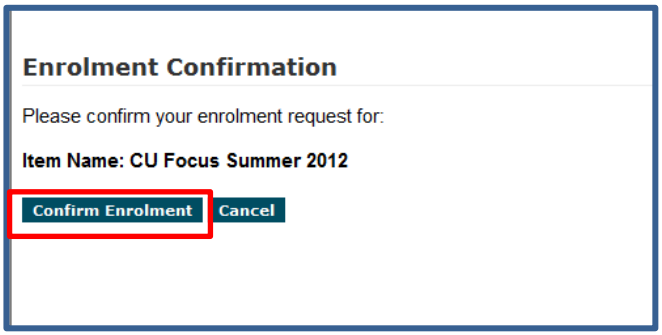
3.
Click **CU Focus Magazine.**

4.
Click the edition of CU Focus you wish to claim.

e.g: CU Focus Summer 2012

5.
Click on the link which will bring you to the website where you can download a readable copy of the magazine.

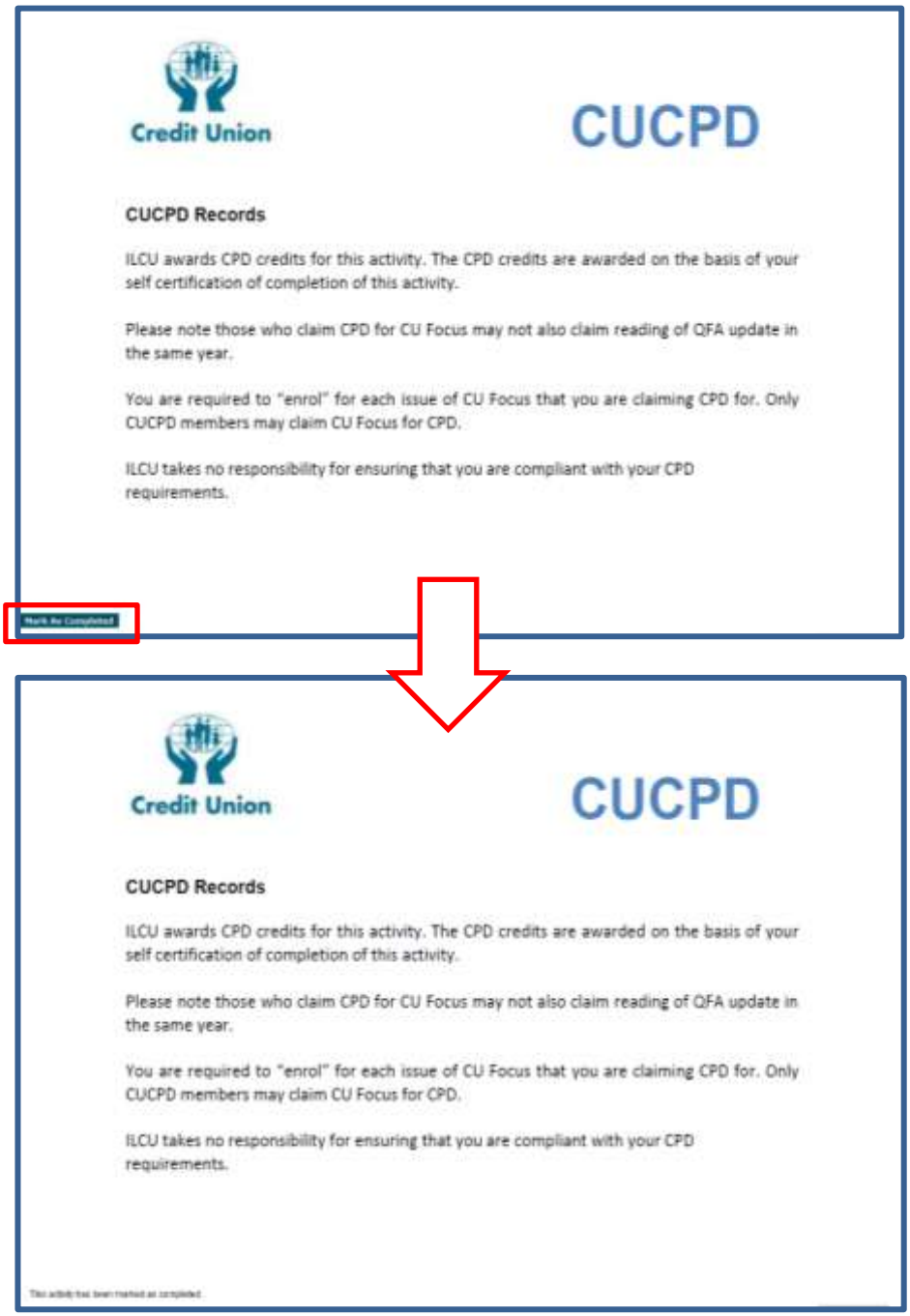
6.
Once you have read the magazine you can then click on **Enrol Me** to add this to your record.



7.
Once you have enrolled click **Confirm Enrolment**.

8.
Click on **Go to Course Sessions** to begin.

You will see a list of courses you are enrolled on, click on the title.


Credit Union
CUCPD
CUCPD Records
ILCU awards CPD credits for this activity. The CPD credits are awarded on the basis of your self certification of completion of this activity.
Please note those who claim CPD for CU Focus may not also claim reading of QFA update in the same year.
You are required to "enrol" for each issue of CU Focus that you are claiming CPD for. Only CUCPD members may claim CU Focus for CPD.
ILCU takes no responsibility for ensuring that you are compliant with your CPD requirements.
9
Credit Union
CUCPD
CUCPD Records
ILCU awards CPD credits for this activity. The CPD credits are awarded on the basis of your self certification of completion of this activity.
Please note those who claim CPD for CU Focus may not also claim reading of QFA update in the same year.
You are required to "enrol" for each issue of CU Focus that you are claiming CPD for. Only CUCPD members may claim CU Focus for CPD.
ILCU takes no responsibility for ensuring that you are compliant with your CPD requirements.

9.
Read the guidelines carefully, click **Mark as Completed** and close the window. The hours are now added to your CUCPD record.

NB

CU CPD Members cannot claim CU Focus Magazine in addition to reading QFA Update in the same year.

View CU CPD Record (User)

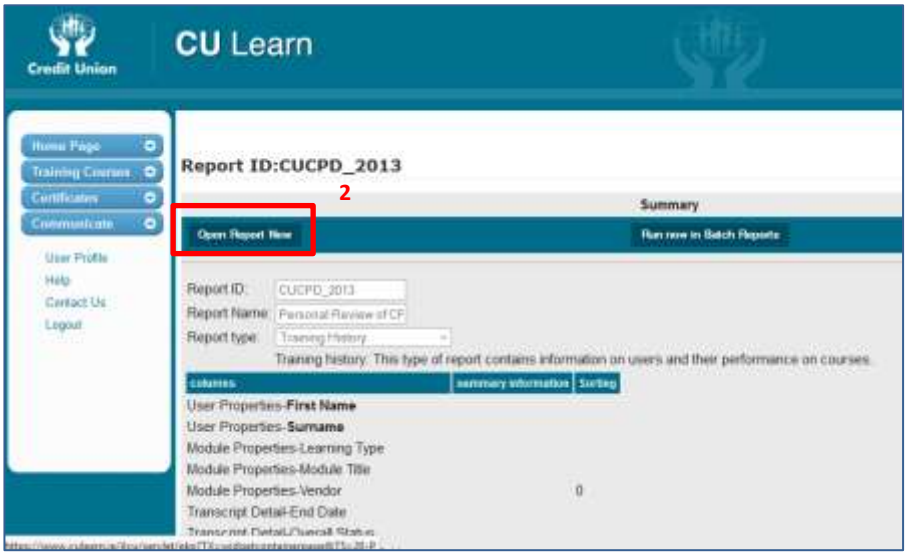
CU Learn allows CU CPD Members to view a record of training undertaken; this includes all ILCU events and also any approved external events added by the user.

From the CU Learn Homepage:

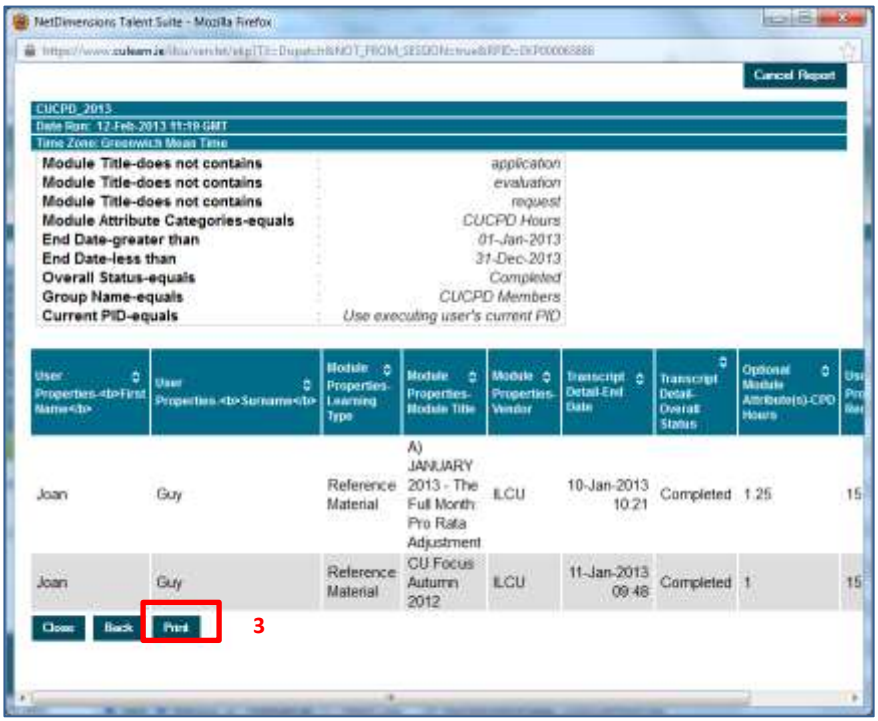
1.
When you log into CU Learn, your CPD Reports are listed on the Home Page.
A. Run this report to see all CPD training to-date in the current year.
B. Run this report to compare hours completed to your CPD requirement for the year.

Reports for the previous year are also listed.

To run a report:



2.
Click **Open Report Now** to display the report in the browser window.


NetDimensions Talent Suite - Mozilla Firefox
Cancel Report
CUCPD_2013
Module Title-does not contains application
Module Title-does not contains evaluation
Module Title-does not contains request
Module Attribute Categories-equals CUCPD Hours
End Date-greater than 01-Jan-2013
End Date-less than 31-Dec-2013
Overall Status-equals Completed
Group Name-equals CUCPD Members
Current PID-equals Use executing user's current PID
Joan Guy Reference Material A) JANUARY 2013 - The Full Month Pro Rata Adjustment ILCU 10-Jan-2013 10:21 Completed 1.25
Joan Guy Reference Material CU Focus Autumn 2012 ILCU 11-Jan-2013 09:48 Completed 1
Close
Back
Print
3

3.
Click **Print** to print the report.

NB

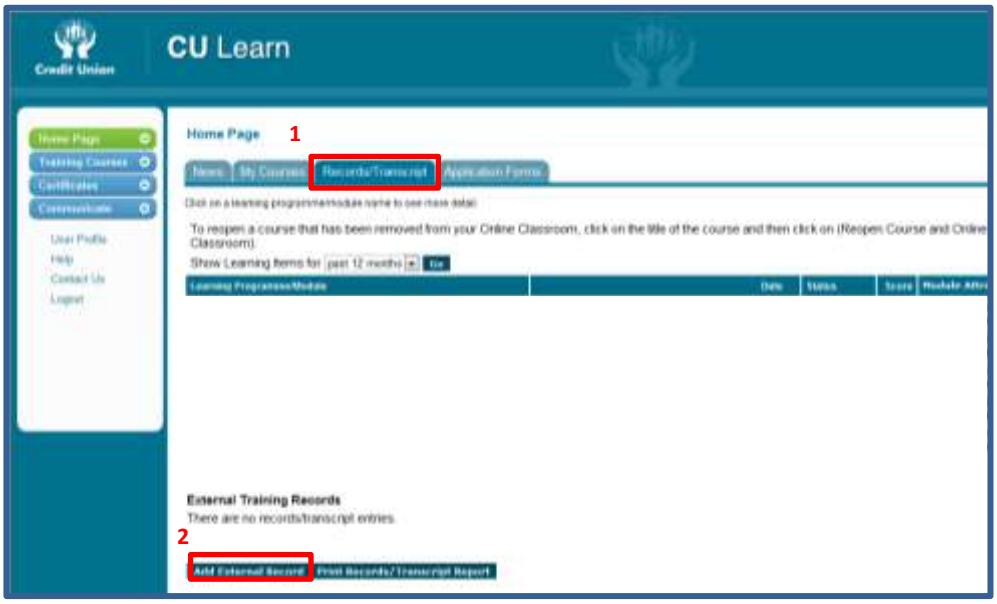
It is the responsibility of the individual to keep thorough records of all CPD activity should they be subject to audit.

Training Records

Add External Non-CPD Events to a Record (User)

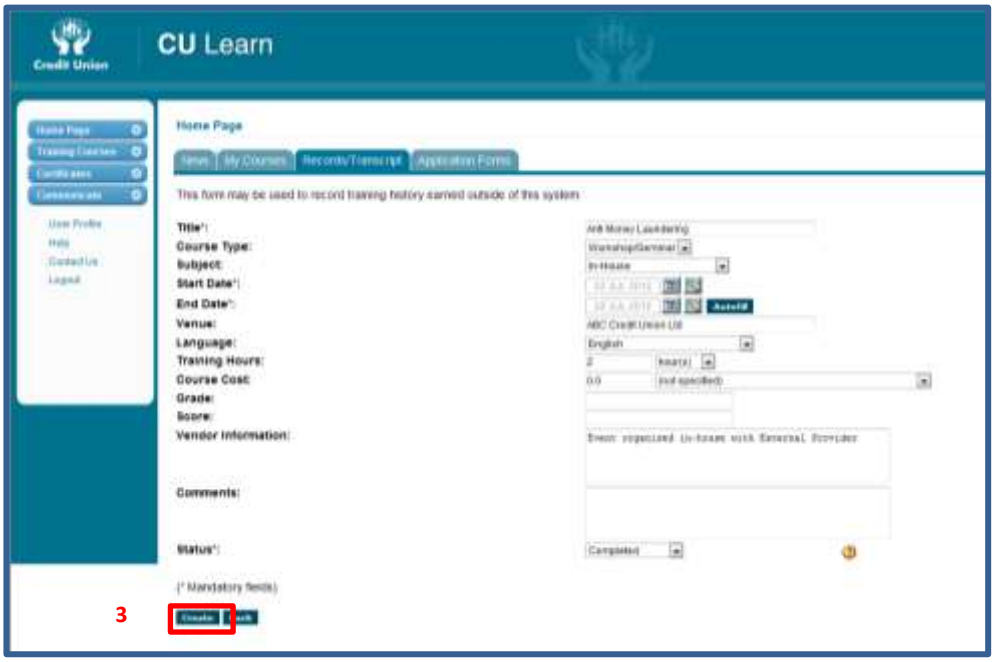
CU Learn allows users to add hours to their private records from inhouse or external courses. These events do not require CU CPD allocation and are not added to the CUCPD record.

From the CU Learn Homepage:

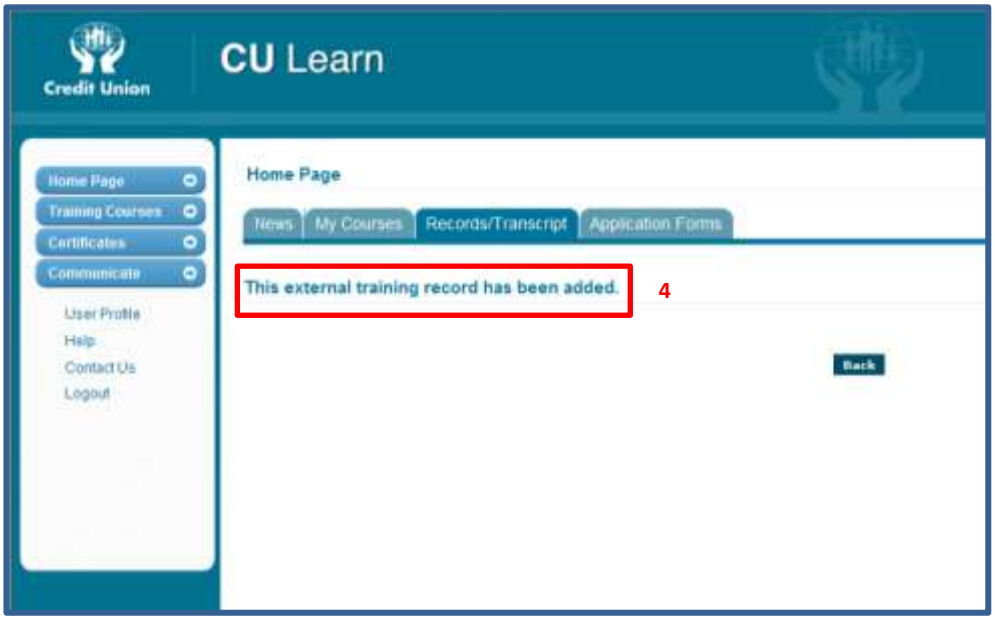


1.
From the Homepage click **Records/Transcripts**.

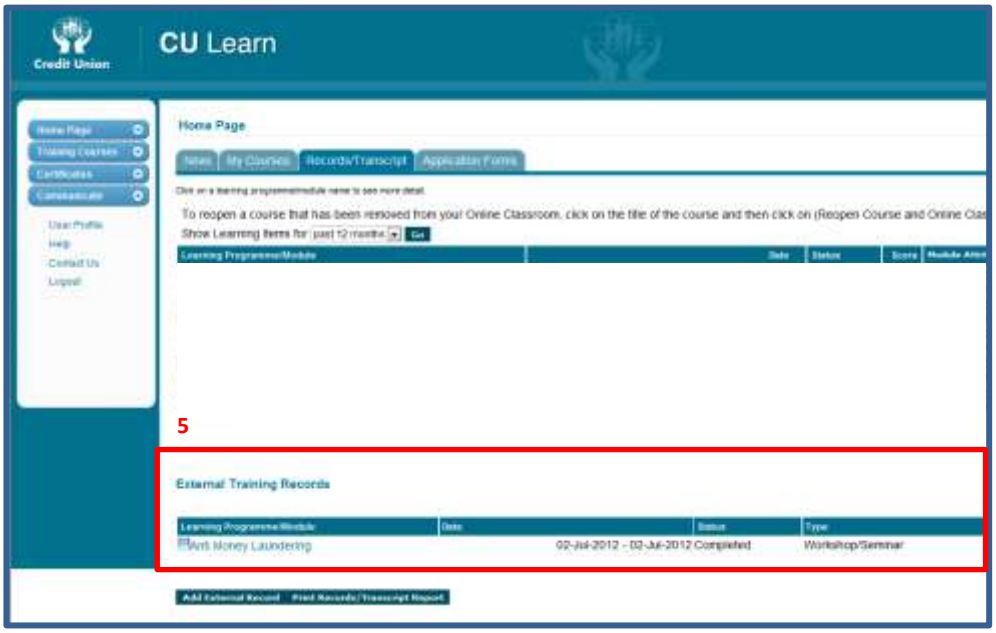
2.
Then click **Add External Record.**



3.
Fill out all fields where applicable and Click **Create.**
e.g shown: an in-house AML session



4.
You will see confirmation of this new training record.



5.
Click **Records/Transcripts** and you will see this event listed under External Training Records.

NB

This facility is a means to keep your user records up to date with external events you may have attended.

This is not to be used by CU CPD Members as these events have not been approved for CPD purposes.

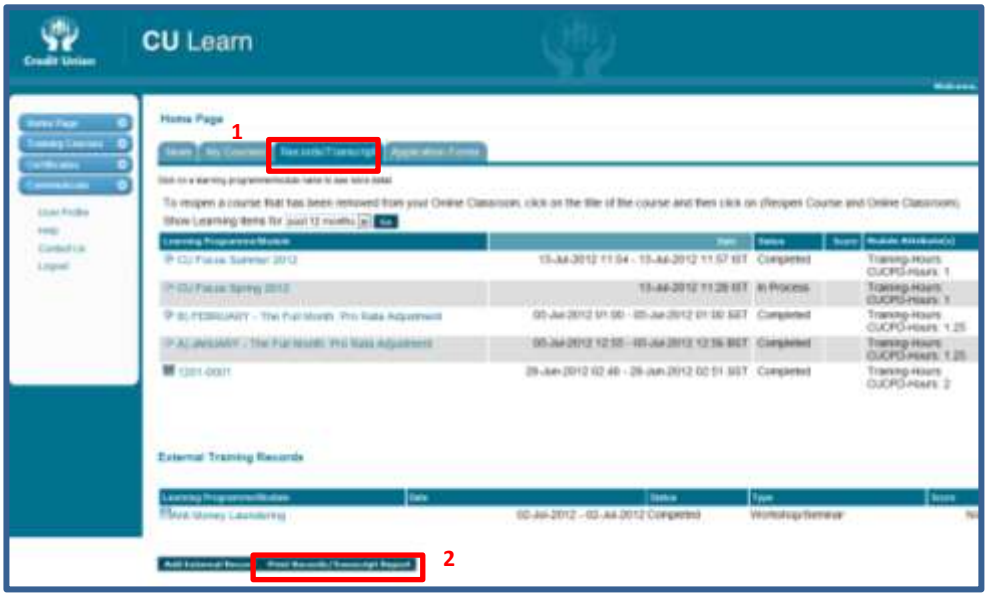
Users must maintain their own records of training for all external courses.

How to Print your Training Record (Non-CPD Members)

CU Learn allows users to print a record of training undertaken; this includes ILCU events and also any external events added by the user.

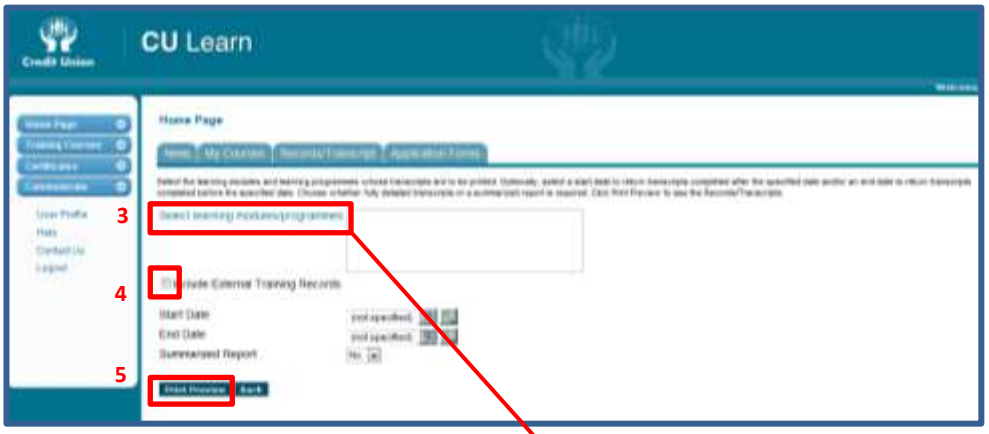
Note: If you are on the CUCPD sheme, go to View CU CPD Record (User)

From the CU Learn Homepage:



1.
From the CU Learn Home Page click **Records/Transcripts**.

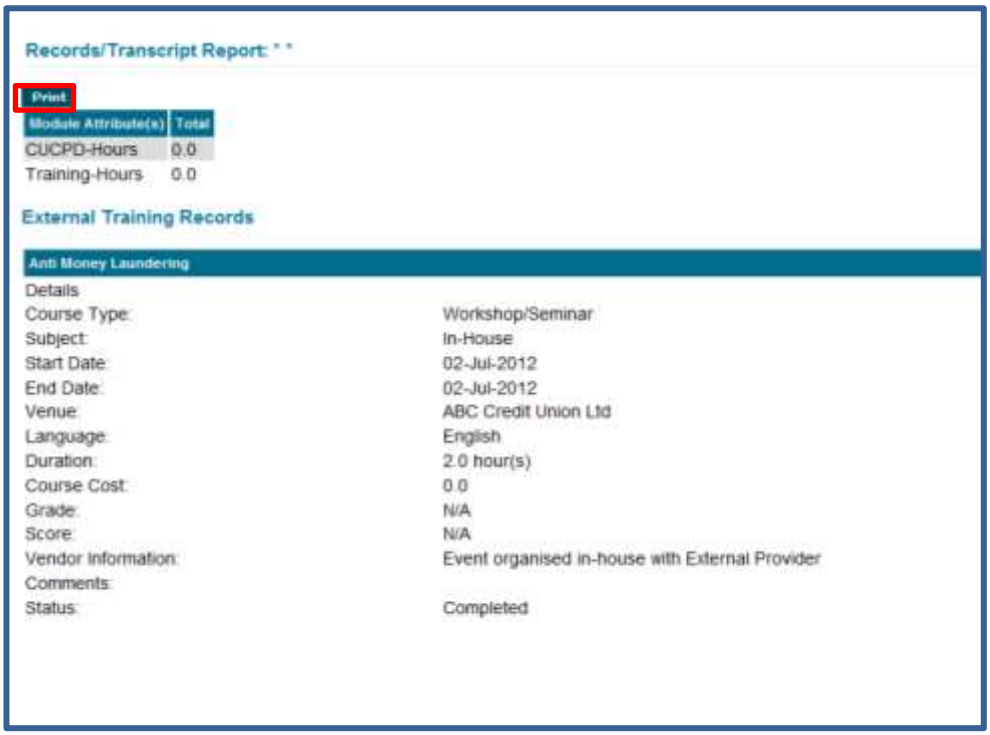
2.
Then click **Print Record/Transcript report**



3.
Click **Select learning modules/programmes**
This will create a page where you can select the titles you wish to include.

4.
Tick the box if you wish to include external training.

5.
Once you have updated all fields, click **Print Preview**.



6.
Click **Print.**

Only ILCU events will be counted in the CUCPD-Hours total at the top of the report, all external events will not be counted but will be viewable in the report.

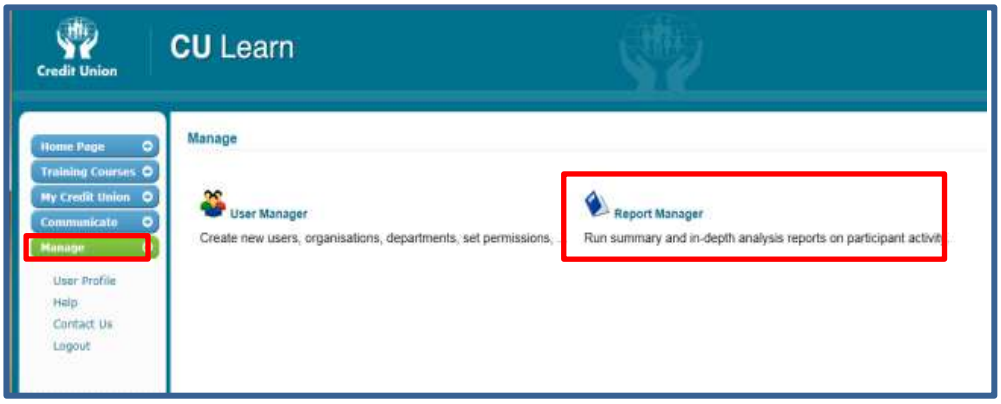
NB

Users must maintain their own records of external training.

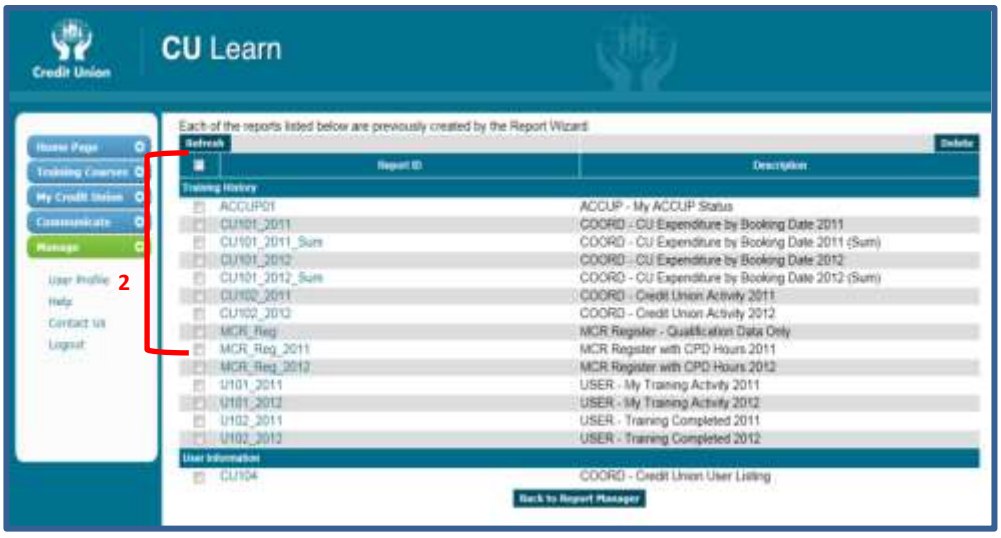
Review and Print Training Record (Coordinator)

You can run a number of various financial, activity, compliance and management reports for your credit union using CU Learn. Many of these reports will be available to you as quick links from the CU Learn **Homepage** or the *CU Learn Coordinators Support Area*. The full list of reports is available from the **Manage** option. To view these:

From the CU Learn Homepage:



1.
Click **Manage** and ***Report Manager.***



2.
Click the name of the report you want to run.

3.
A popup screen will appear named ***Report Summary***. Scroll down to the output format.

You can choose to open the report in different formats. Simply select the format you wish to view it in.

Finally click ***Open Report Now***. Your report will open in whichever program you have selected.

4.
Your chosen report will display.

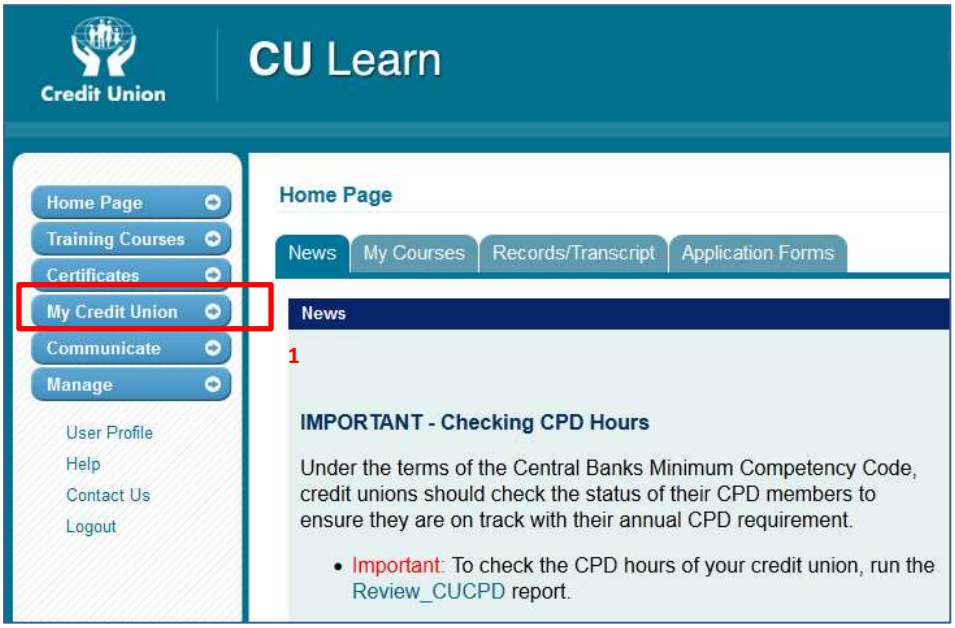
NB

CU Learn provides a number of template reports such as the above. If you have a report that you feel would be of benefit to credit unions contact CU Learning & Development to see if it can be provided.

Approving Pathways Bookings (Coordinator)

Before a student is accepted onto the Pathways Certificate, a coordinator must approve or deny their enrolment request. Coordinators receive a system email to notify them that a student has requested approval. The following steps describe how to do approve:

From the CU Learn Homepage:



1.
On the left-hand menu, click **My Credit Union**.

2.
Click the **Enrollment Approval** tab.

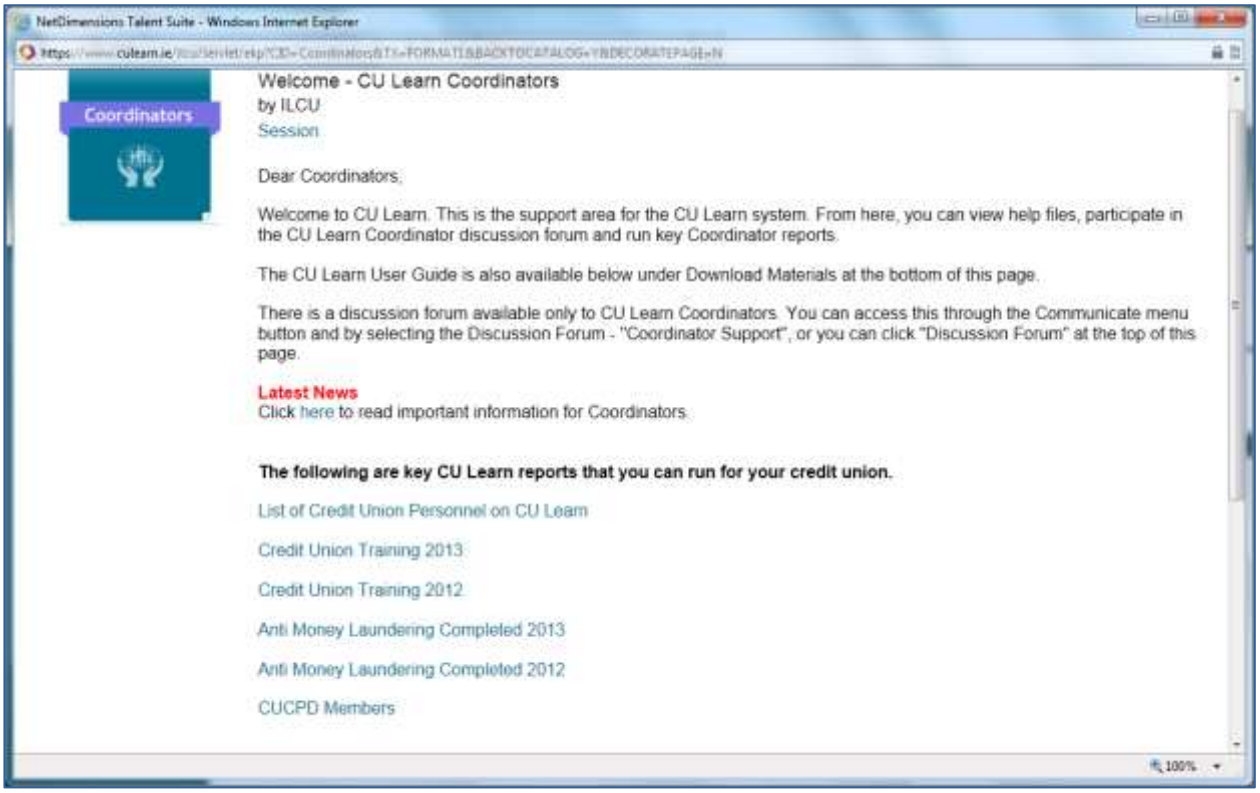
3.
Check the request and then click the **Approve** or **Deny** button.

If you deny an enrolment, you will be asked to provide a reason. This reason will be included in an email to the user.

The Coordinator Support Area

A CU Learn Coordinator support area has been set up to provide further advice and assistance to CU Learn Coordinators. This includes a Coordinators **Discussion Forum** where Coordinators from different credit unions can discuss issues and share experiences they have with CU Learn, or training in general. In addition various training and CU Learn supports will be made available in this area.

To access the Coordinator Support Area click on **Training Courses** and select the **Coordinator Support Area** Catalogue. The following screen is displayed:


NetDimensions Talent Suite - Windows Internet Explorer
Coordinators
Welcome - CU Learn Coordinators
by ILCU
Session
Dear Coordinators,
Welcome to CU Learn. This is the support area for the CU Learn system. From here, you can view help files, participate in the CU Learn Coordinator discussion forum and run key Coordinator reports.
The CU Learn User Guide is also available below under Download Materials at the bottom of this page.
There is a discussion forum available only to CU Learn Coordinators. You can access this through the Communicate menu button and by selecting the Discussion Forum - "Coordinator Support", or you can click "Discussion Forum" at the top of this page.
Latest News
Click here to read important information for Coordinators.
The following are key CU Learn reports that you can run for your credit union.
List of Credit Union Personnel on CU Learn
Credit Union Training 2013
Credit Union Training 2012
Anti Money Laundering Completed 2013
Anti Money Laundering Completed 2012
CUCPD Members
100%

If you cannot find your answer via this area, the help screens or in this user guide, you can contact CU Learning & Development at culearn@creditunion.ie . For urgent enquires or system support, call 00 353 1 614 6964.

Frequently Asked Questions on CU Learn

Registration & User Details	Answer
I did not receive an email confirming my registration on the system?	Coordinator may not have approved your registration or no Coordinator has been set up. *See* Approve Registration Request (Coordinator) Check email address you provided is correct, check junk mail or email filters on your email account.
Does not accept my logon details?	Ensure you have the correct logon details.
Forgotten my password?	Reset password using the reset option. Your registration details will be reset. *See* Update existing User Account (e.g. Reset a User Password)
How much does CU Learn cost?	CU Learn is free for all affiliated credit unions to the ILCU.
Can I change my email address?	Yes, you can go into the user editor on the CU Learn Home Page and change or update an email at any time. *See* Update My Details (User and Coordinator)
What is my user ID?	If you have a CU Learn account and are unsure of your user ID, ask your CU Learn coordinator.
Booking a Course	
Will I be informed if a course is cancelled?	Yes you will be emailed should a course cancel for any reason. You will only receive this notification if you have already enrolled on the course through CU Learn.
How do I book inhouse training?	Go to the *Book Inhouse Training* link on the CU Learn home page. See Request In-house Course for your Credit Union or Chapter.
Will I be charged if I withdraw form a course?	Cancellation policies depend on the type of training e.g. accredited programmes, in-house etc. The withdrawal policy is clearly explained on the course enrolment page.
How do I view the training I have enrolled on?	All training is listed under the *My Courses* tab.
Coordinators	
Can there be more than one CU Learn Coordinator?	CU Learn has been designed to have one CU Learn Coordinator in each credit union. This person can be changed if required.
Can I book multiple people onto a course?	The CU Learn Coordinator you can book other users via the "My Credit Union" option on the CU Learn Home Page. *See* Book Someone Else on a Course (Coordinator)
Can I as the Coordinator cancel a user's booking?	No, but you are informed by email of all bookings and may ask a user to withdraw from a course.
Can I produce custom training reports?	No, however ILCU has produced standard reports. Contact ILCU if you require a report not currently listed on the system.
I have set up a user but can't see them under my credit union?	Check that their status has been set to Active. *See Approve Registration Request (Coordinator)* Check from User Manager that the user account is not set to "Account Closed".
How do I see the courses someone in my credit union is booked on?	Go to My Credit Union - My People. Click the icon to the right of the person's name. Courses are listed on the *My Courses* tab for the user.

Coordinators (contd.)	
How do I see all training activity in my credit union?	Go to the Report Manager section to see a full list of reports available to coordinators. *See* Review and Print Training Record (Coordinator)
Certificates	
My training certificate will not print?	Ensure that your computer is connected to a printer. If the problem persists click on print, advanced, and select "print as an image".
CU CPD	
What is the difference between CU Learn and CU CPD?	CU Learn is a training administration system that manages all training delivered by the ILCU. CU Learn is free to use. CU CPD is a scheme which credit union personnel may apply to join to manage their CPD. CU CPD costs €100/£80 per annum to join.
How do I know if I am on the CU CPD scheme?	You will have access to the CU CPD member's area under *Training Courses*. If you cannot see this area you have not been set up. Contact CU L&D.
How do I add non-ILCU hours to my CPD record?	Once the course receives CPD accreditation from the ILCU, the course is available on CU Learn for you to enrol. *See* Add Non-ILCU CPD hours to a CU CPD Record (User).
How do I check my CPD record?	CU CPD members can track their CPD hours by running the CPD reports on the CU Learn home page. *See View CU CPD Record (User).*
How do I record pro-rate hours for maternity leave?	*See Add Pro Rata CPD hours to a CU CPD Record (User)*